



Stanford Systems UK Ltd

Online Management of Interpretive Services (OMIS)

User Manual for OMIS Administrators

Version 4.1

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

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User Manual for OMIS Administrators

1. Introduction and Overview

1.1 Overview

The OMIS system allows remote users to book and schedule appointments for language interpreters. The system is Web based, which means that any users that have an active Username and Password are able to use the system via the NHSNet. In the case of OMIS users, they can access the system via the Intranet.

NHS Organisations such as GRIP provides language interpretation services to a number of organisations, including healthcare, Social Services, housing and occasionally solicitors.

The services provided include the following:

- Face to face interpreting
- Specialised interpreting in sensitive areas such as mental Health and HIV
- Telephone interpreting, normally only provided when unable to provide a face to face interpreter
- Translation of documents and letters.

Rapid growth of the NHSNet and e-applications within the NHS caused the Interpretive Service Providers to consider providing their service on the Web.

The OMIS system should allow the NHS to improve the service provided to their customers and also allow staff resources to be diverted from manual bookings to on-line support.

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2. Organisational Administration

This section describes the users of the system:

2.1.1 *Systems administrator*

The objective of the Systems Administrator is to ensure the efficient running of the OMIS system.

Accepts or rejects on-line applications from customers for new accounts. Accepts or rejects on-line applications from OMIS users, customers and interpreters.

Configure reports for on-line users. Configure user access to the on-line system

2.1.2 *Customer support officer*

The objective of the Customer support officer will be to provide support to customers via the on-line system, telephone, text-messaging and email. This is primarily for unconfirmed booking requests. The support will be offered for bookings where the interpreter has tentative availability and also where an interpreter is not available for a particular date/time. The support officer will need to call interpreters in order to fill the slots.

2.1.3 *Interpreter support officer*

The objective of the Interpreter support officer will be to provide on-line, telephone, text-messaging and email support for interpreters so that the interpreter's diary gives an up-to-date view of availability. This role will also play a part in assisting the Customer Support Officer complete unconfirmed booking.

2.1.4 *Finance officer*

OMIS user who requires finance information for invoicing and payments

2.1.5 *Interpreter*

Mixture of employees and freelance, full-time and part-time staff. There are approximately 640 interpreters, approximately 70% of who are active.

2.1.6 *Customer Administrator*

Responsible for creating customer Account and users. This user is based at the customer site.

2.1.7 *Customer bookings officer*

Responsible for creating and following bookings at the customer site.

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2.1.8 Summary of users of the OMIS System

Name	Description	Type
Service manager	In charge of all staff at the Host Site	OMIS user
Performance manager / Systems administrator	Reports to the service manager and Responsible for the interpreters and all other staff	OMIS user
Customer support officer	Provide support to customers	OMIS user
Interpreter support officer	Provide support to interpreters	OMIS user
Finance officer	Uses Finance information for payments and invoicing	OMIS user
Interpreters	Mixture of employees and freelance, full-time and part-time staff. There are approximately 640 interpreters, approximately 70% of who are active.	Interpreter
Customer Administrator	Responsible for Creating customer Account and users within the customer site	Customer
Customer bookings officer	Responsible for making bookings	Customer

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3. System Administration and Registration

This manual has been created for the OMIS System administrators. It describes all the administrative tasks that are necessary to ensure the efficient running of the System. The first section describes the registration process that the Customers carry out. This has been included in this manual so that administration staff are familiar with this process and will then be able to complete the Activation process that is necessary to ensure that Customers are able to login.

This section is written to familiarise the OMIS user with the System Administration and registration process. Customers and users must be able to register on the system and receive the required activation/deactivation from the administering organisation.

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3.1 Customer Registration

3.1.1 Account Holder Registration

The Administrator at the Customer Site will need to create the account for the Customer and the Systems Administrator. This will need to be started at the Sign-in form. The administrator will not be able to login-in with a user id and password unless this account is created. The Administrator or Account Manager will need to follow this process. The process is started by clicking the 'Register' button on the Sign-on form.

On clicking the 'Register' button for the first time an 'Anonymous account' is created. It is this anonymous account that is used to register all subsequent accounts and users with the 'Register' Button. The 'Register' button is only to be used for creating NEW customer accounts and should NOT be used to register existing users of the same organisation.

The procedure for opening this account is shown below:

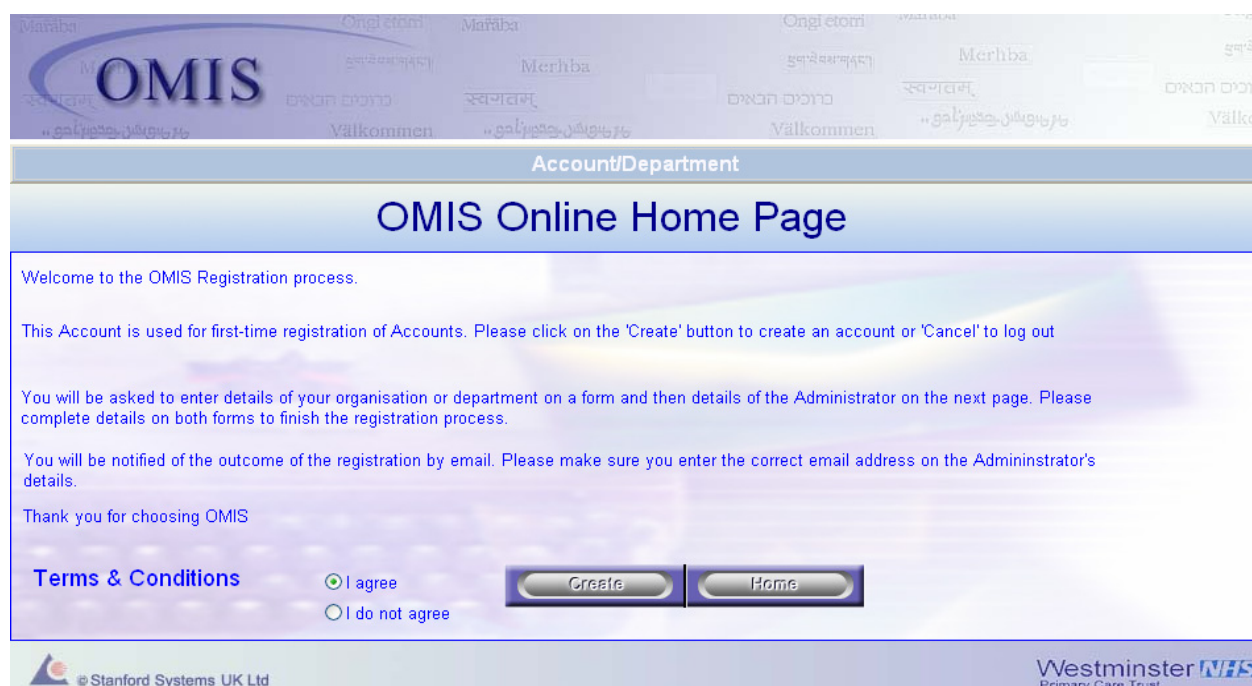
Click the 'Register' Button

This will take you to the 'OMIS Online home Page'. This will give the instructions for registering an account. You will also be asked to agree to the Terms and Conditions for creating an account.

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3.1.2 Agree Terms & conditions

Select the 'I Agree' Terms & Conditions and then Click on the 'Create' button so that your account details can be entered.



The screenshot shows the OMIS Online Home Page. At the top, there is a header with the OMIS logo and the text 'Account/Department'. Below this, the main heading is 'OMIS Online Home Page'. The page contains several paragraphs of text explaining the registration process. At the bottom, there is a section for 'Terms & Conditions' with two radio buttons: 'I agree' (selected) and 'I do not agree'. To the right of these buttons are two buttons: 'Create' and 'Home'. The footer of the page includes the logo for Stanford Systems UK Ltd and the logo for Westminster NHS Primary Care Trust.

OMIS

Account/Department

OMIS Online Home Page

Welcome to the OMIS Registration process.

This Account is used for first-time registration of Accounts. Please click on the 'Create' button to create an account or 'Cancel' to log out

You will be asked to enter details of your organisation or department on a form and then details of the Administrator on the next page. Please complete details on both forms to finish the registration process.

You will be notified of the outcome of the registration by email. Please make sure you enter the correct email address on the Administrator's details.

Thank you for choosing OMIS

Terms & Conditions

☒ I agree

☐ I do not agree

Create Home

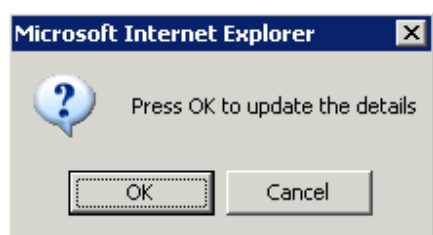
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3.1.3 Account Details - 'Required Fields' and Validation

If you click on the 'Submit' button without entering any data and then press 'OK' to update the details,



Then the error messages for the required fields will be displayed. These are the fields where information must be entered in order to 'Register' the account.

You may have noticed that messages are not displayed for the drop-down list boxes although these are mandatory. This is because a default value is always displayed in the dropdown list box. You may select another value, if required.

A summary of the error messages is displayed at the top of the form and a star (*) is displayed beside the field that is required.

Welcome to the OMIS Registration process.

This Account is used for first-time registration of Accounts. Please click on the 'Create' button to create an account or 'Cancel' to log out

You will be asked to enter details of your organisation or department on a form and then details of the Administrator on the next page. Please complete details on both forms to finish the registration process.

You will be notified of the outcome of the registration by email. Please make sure you enter the correct email address on the Administrator's details.

Thank you for choosing OMIS

Terms & Conditions

☒ I agree ☐ I do not agree

[Create](#) [Home](#)

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Enter the details for your Account. Details of the 'Another PCT' account are shown below. Any fields that still generate an error will display the Star (*) as soon as the typing is complete. E.g. the postcode will display an error message as soon as an invalid postcode is entered.

The Account Type is set to 'Customer' by default. And the 'Organisation' to 'Self'. This means that the 'Account Holder' Account needs to be defined First and then any departments. 'Another PCT' is being registered as the 'Parent' or Account Holder organisation and will be responsible for administration and payments of the departments that will subsequently be registered. This is the method used for registering the Customer account of all Parent Organisations, where the Customer is initiating the registration process.

The other option is for staff at the Hosting site to enter the details of the organisation and activate the accounts.

On entering the details, once the postcode is corrected, the (*) error will disappear.

Account/Department

Create Account

- You must enter organisation/Department name
- You must enter an Account Number
- You must enter the address
- You must enter the postcode

Account Type Customer	Organisation (Parent/Self) Self	Organisation Name / Department of Parent Another PCT	
New Account No	Phone 0207 150 2832	Fax 0207 384 4849	Address and Postcode 134 Pandal street
Old Account No	NHS Organisation Code	NHS Organisation Type Clinic	London
Web Site Address	Status Active	NW4 5RT	

Notes

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If the postcode is invalid and the 'Submit' button is pressed, then the form will be re-displayed with the appropriate error. On correcting and re-submitting, the error will disappear and the details will be saved on the on-line system.

The start date and the end dates for the account do not need to be entered. These will be generated and displayed by the system as appropriate.

Once the account details have been entered, the Administrator details for this account will be requested as shown. Enter the details for the 'Administrator'. Example details are shown below for 'Another PCT'. Please make sure that you note the password that you have used.

Account/Department

Create

User No:

Firstname <input type="text" value="Administrator"/>	Surname <input type="text" value="Person"/>	User Type <input type="text" value="Customer"/>	Registering Organisation <input type="text" value="ANOTHER PCT"/>
User Name <input type="text" value="admin101"/>	Password <input type="text" value="pw303"/>	Confirm Password <input type="text" value="pw303"/>	User Privilege <input type="text" value="Admin"/>
Department <input type="text" value="Finance"/>	Phone <input type="text" value="0207 384 3283"/>	Fax <input type="text" value="0207 384 3484"/>	User Status <input type="text" value="New"/>
Email Address <input type="text" value="admin.person@anotherpct.nhs.uk"/>	Role <input type="text" value="Administrator"/>	Mobile <input type="text" value="07710 283843"/>	<input type="checkbox"/> Email Confirmation
Job Title <input type="text" value="Finance Director"/>			

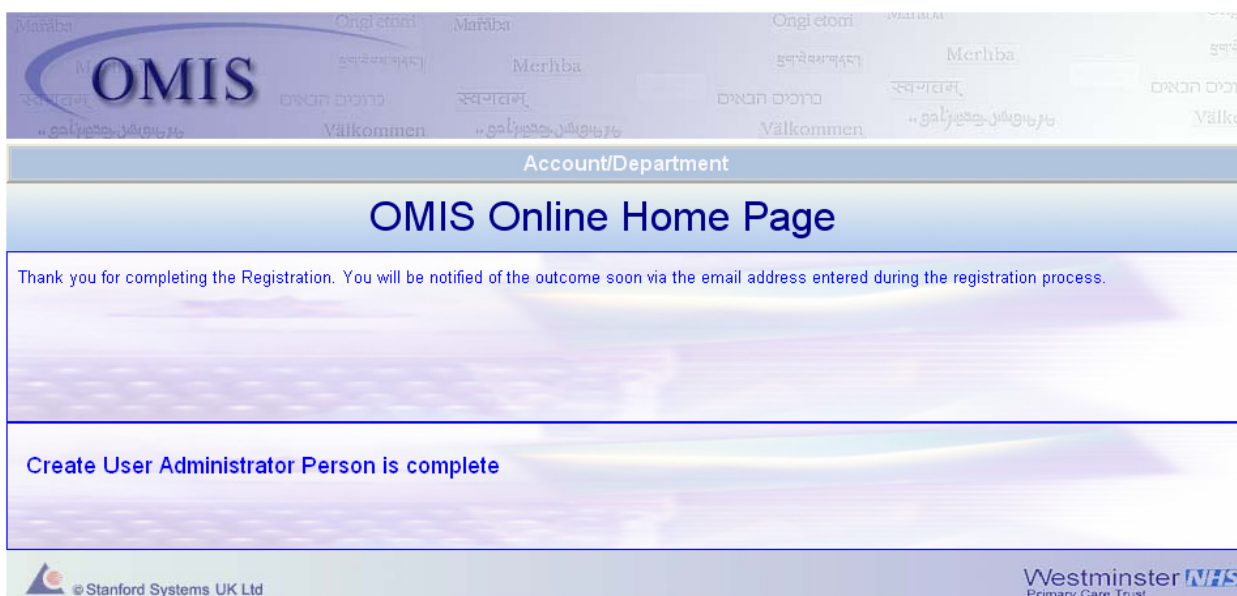
Notes

Request for opening an account for Admin Person at Another PCT. Admin Person will be responsible for payments of all invoices for Another PCT and it's departments.

Again, any mandatory fields and error messages will be displayed on top of the form. Make sure all the details are entered and submit the form, confirming the update.

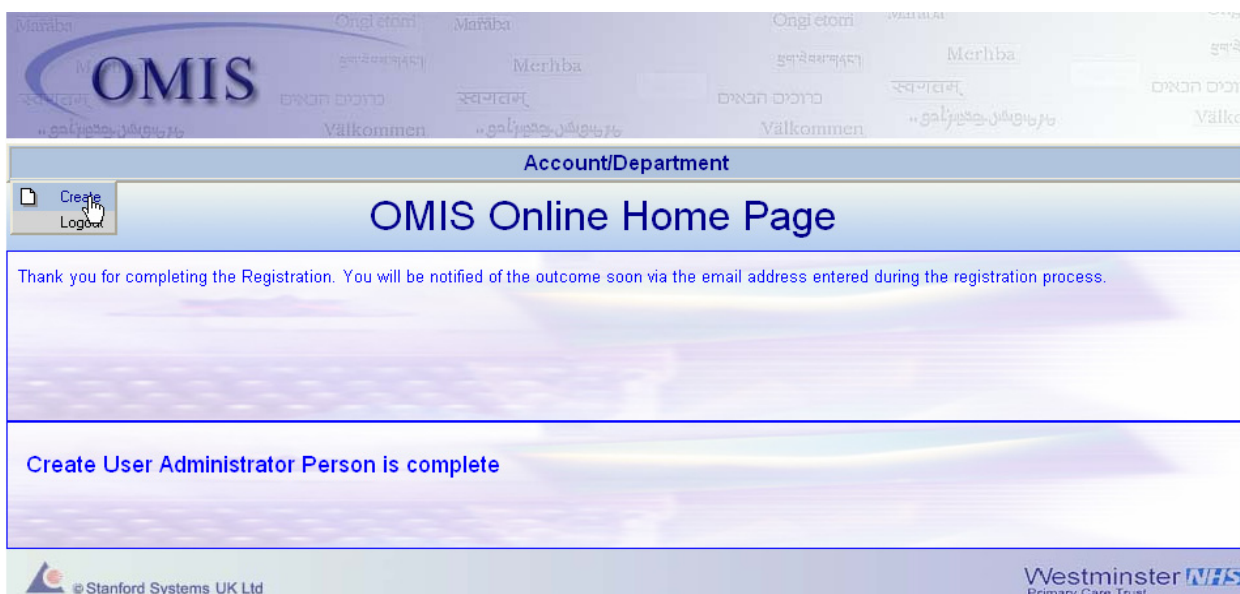
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3.1.4 Registration complete for 'Another PCT' Account



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3.1.5 Creating Departments or Clinics



Once the Account Holder 'Account' has been created, you may create the departments for your organisation. These can be created by using the menu option as shown above. Click on the 'Create' button and enter the details as shown below.

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Account/Department

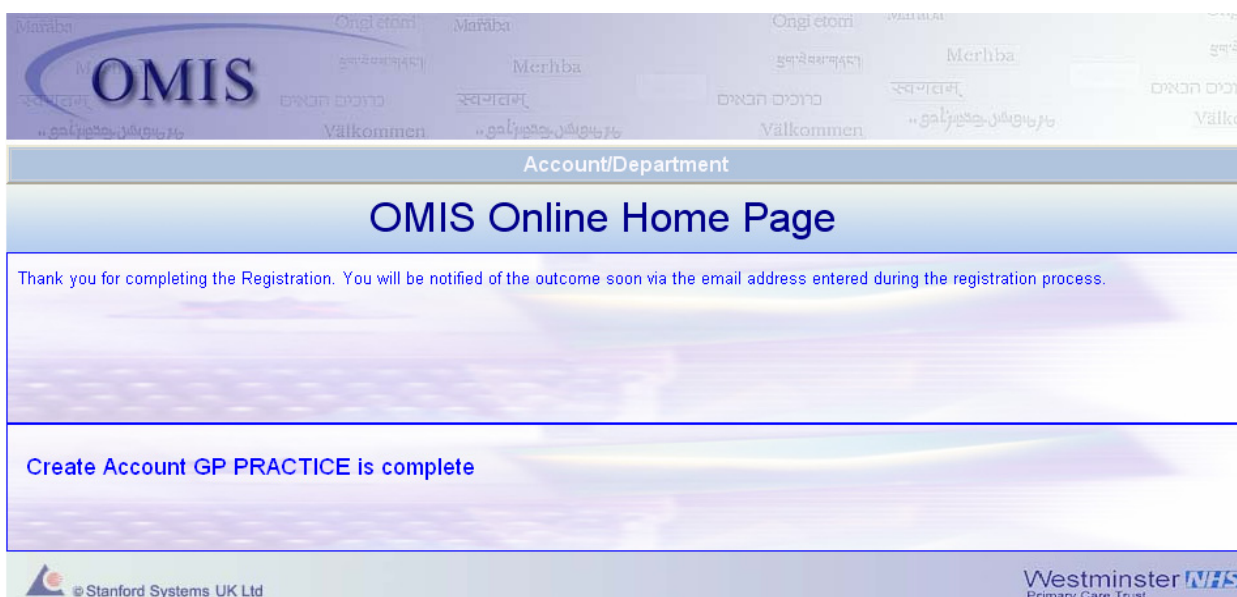
Create Account

Account Type: Customer (dropdown)
 Organisation (Parent/Self): ANOTHER PCT (dropdown)
 Organisation Name / Department of Parent: GP Practice
 New Account No:
 Phone: 0208 384 3844 Fax: 0208 364 2939
 Address and Postcode: 87 Broad Street
 Old Account No:
 NHS Organisation Code: NHS Organisation Type: Clinic (dropdown)
 Web Site Address: Status: Active (dropdown)
 London
 NW5 3DK
 Notes:
 Submit Home

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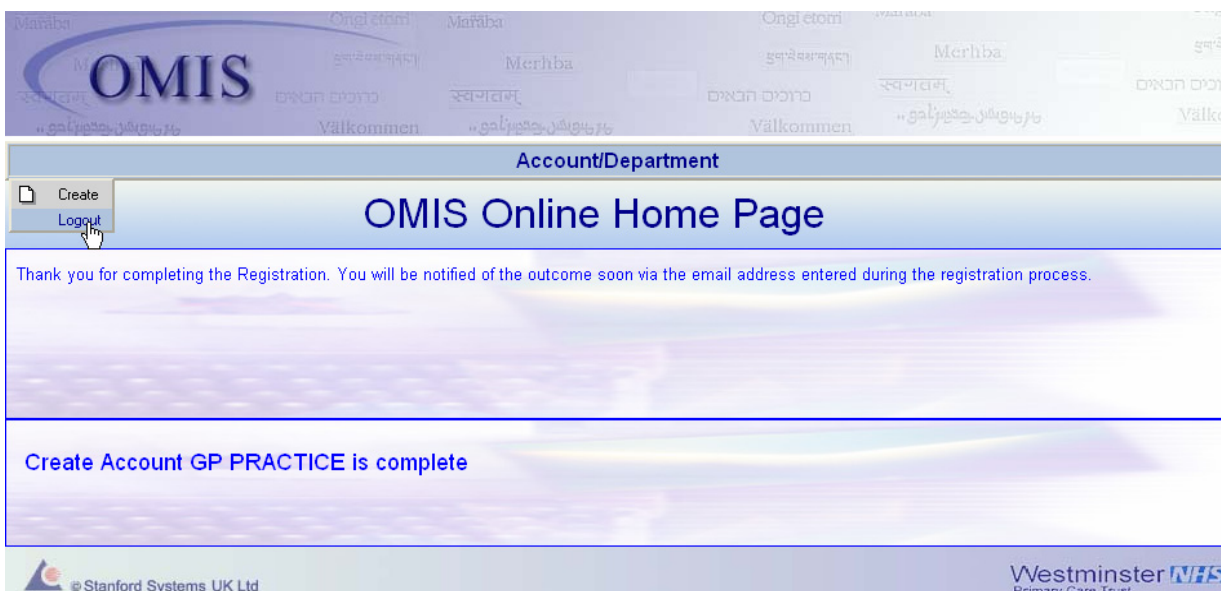
This time you'll notice that the Parent organisation is set to the 'Account Holder' account that was previously created (Another PCT). Enter the details for the department and press the 'Submit' button.

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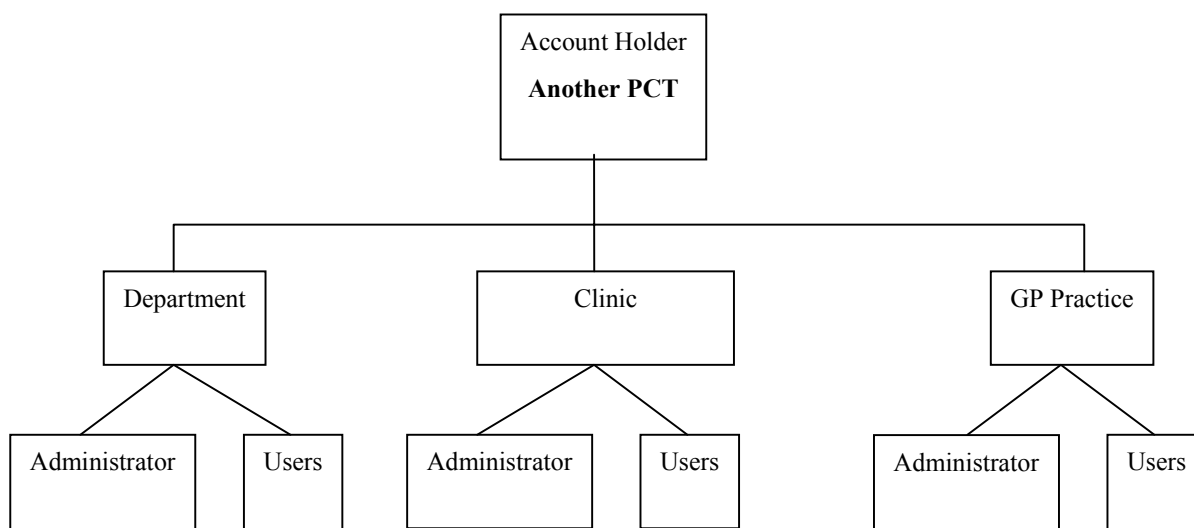


The screen above shows the confirmation on creating the department. You can create as many departments as you require for your organisation. These will then be reviewed by OMIS staff. The Account Holder and departments will be activated by OMIS staff as appropriate.

You can logout from the system after all the departments have been completed by using the 'Logout' menu option as shown below:



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The Organisational structure for 'Another PCT' is shown above. The Registration process allows the Account Holder to create this structure. OMIS administrators will then authorise the structure by activating the various accounts and notifying the Account Holder administrator. OMIS Administrators will also create the administrator (users) at each of the departments and notify the users of the details in order to login to the system. The administrators at each department can then create

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3.2 Maintaining Customer Accounts

Customer accounts can only be maintained by OMIS Administrators. This section describes the tasks that are required to Create, Amend, Activate and Deactivate Customer Accounts.

3.2.1 Login into System

In order to carry out the various administrative tasks the required security access must be supplied to all OMIS Administrators. Whenever an OMIS administrator or user is created, the account is auto-activated. I.e. all OMIS users will be activated on creation and will not require activation.

The following screen shows details required for the creation of an OMIS Administrator: This is covered in the section – Creating an OMIS User account.

The screenshot shows the 'Create OMIS User' form in the OMIS system. The form is titled 'Create OMIS User' and has a navigation bar with 'Account/Department', 'User', 'Booking', 'Reports', and 'Admin'. The form fields are as follows:

- User No: []
- Firstname: Henry
- Surname: Smith
- User Type: OMIS (dropdown)
- OMIS: GRIP ORGANISATION (dropdown)
- User Name: smihen
- Password: pw101
- Confirm Password: pw101
- User Privilege: Admin (dropdown)
- User Status: New (dropdown)
- Department: CLO
- Phone: 020 8243 2343
- Fax: 020 4323 3432
- Mobile: []
- Email Confirmation: ☐
- Email Address: henry.smith@owner.org.uk
- Role: Administrator (dropdown)
- Job Title: Customer Support Officer
- Notes: []

At the bottom of the form are 'Submit' and 'Home' buttons. The footer includes 'Stanford Systems UK Ltd' and 'Westminster Primary Care Trust'.

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3.2.2 Login Validation

Pressing the submit button with out entering any information will display error messages on invalid username and password.

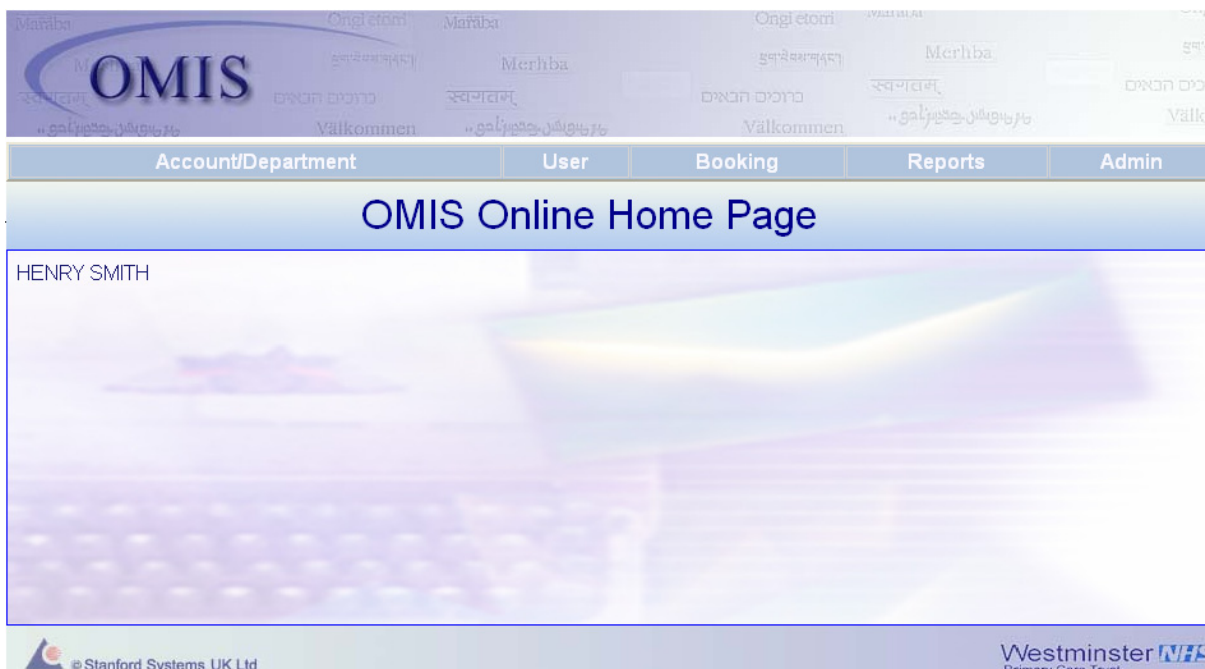


The screenshot shows the OMIS login interface. At the top, there is a header with the OMIS logo and the text 'Välkommen' in multiple languages. Below the header, there are two input fields: 'Username' and 'Password'. To the right of the 'Username' field, there is a red error message: 'You must enter a username'. To the right of the 'Password' field, there is a red error message: 'You must enter a password'. Below the input fields, there are two buttons: 'Login' and 'Register'. The 'Login' button is highlighted with a mouse cursor. At the bottom of the page, there are logos for 'Stanford Systems UK Ltd' and 'Westminster NHS Primary Care Trust'.

3.2.3 Valid Login

Login using the username and password provided by your OMIS administrator.

This should allow you to login, if the account details have been entered and the account is active



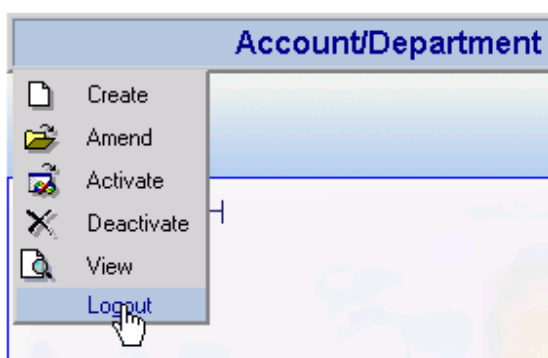
The screenshot shows the OMIS Online Home Page after a valid login. At the top, there is a header with the OMIS logo and the text 'Välkommen' in multiple languages. Below the header, there is a navigation bar with five tabs: 'Account/Department', 'User', 'Booking', 'Reports', and 'Admin'. Below the navigation bar, there is a large blue banner with the text 'OMIS Online Home Page'. Below the banner, there is a large white box with the text 'HENRY SMITH'. At the bottom of the page, there are logos for 'Stanford Systems UK Ltd' and 'Westminster NHS Primary Care Trust'.

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3.2.4 OMIS Account Privileges

3.2.4.1 Administration of Customer Accounts

The OMIS administrator should be able to access the following menu options for the Account/Department option on the system.



A summary of these options is given below:

Create – Create a New Account for Customer

Amend – Amend an existing Customer Account

Activate – Activate an inactive account

Deactivate – Convert an active account to an inactive account

View – View customer account details

Logout – Logout from current session

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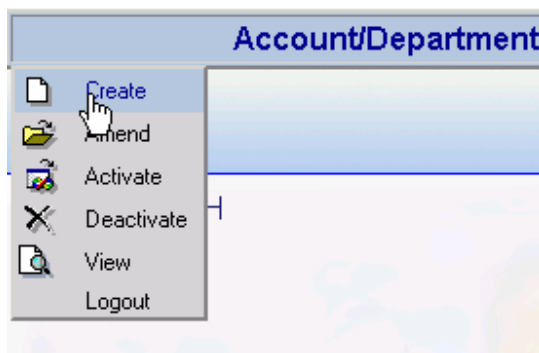
3.2.5 Creating a New Customer Account

Customer accounts can be created in two ways

- (1) by the customer using remote registration
- (2) by the OMIS administrator entering the details supplied by the Customer

This section shows the latter method

After Login, the OMIS administrator selects the Account/Department, Create option from the Menu as shown below:



A blank form will be displayed as shown below and the required fields will need to be completed for the Customer:

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OMIS

Account/Department User Booking Reports Admin

Create Account

Account Type: Customer
 Organisation (Parent/Self): Self
 Organisation Name / Department of Parent:
 New Account No:
 Phone: Fax: Address and Postcode:
 Old Account No: NHS Organisation Code: NHS Organisation Type: Clinic
 Web Site Address: Status: Active
 Notes:
 Submit Home

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Once the required fields are completed, Submit and save the form. An example 'Another PCT' has been created and the details are shown below. Note that the details completed here and those completed by the Customers that Register on the system are the same.

The Organisation/Self field is important since it determines whether the Customer you are creating is an 'Account Holder' or a department. If you select 'Self', then an Account Holder will be created, where the Customer will not have a parent Account. If you select an existing name, then this will become the Account Holder of the Customer you are creating. As an example you may select 'St Mary's NHS Trust' as the Parent and enter 'General Surgery OPD' in the Organisation name/Department, therefore a Department will be created as 'General Surgery OPD' and its account holder will be 'St Mary's NHS Trust'. This is important when Reporting for Invoice purposes since the Invoice will be sent to the Account Holder and All on the appointments for 'General Surgery OPD' will be included in the 'St Mary's NHS Trust' Invoice.

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3.2.5.1 Creating an 'Account Holder'

Account/Department Create

User No:

Firstname: Surname: User Type: Registering Organisation:

User Name: Password: Confirm Password: User Privilege: User Status:

Department: Phone: Fax: Mobile: ☐ Email Confirmation

Email Address: Role: Job Title:

Notes
Request for opening an account for Admin Person at Another PCT. Admin Person will be responsible for payments of all invoices for Another PCT and it's departments.

The details above are for the creation of an Account Holder (PCT) in this case.

Create Account ANOTHER PCT is complete

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After submitting and confirming the update, the above message confirms that the Account has been created.

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3.2.5.2 Creating a Department

When creating departments for the above Account Holder, you will need to enter the details similar to those shown on the following page. Again use the 'Account/Department', 'Create Menu option to access the screen:

OMIS

Account/Department User Booking Reports Admin

Create Account

Account Type: Customer Organisation (Parent/Self): ANOTHER PCT Organisation Name / Department of Parent: General Surgery OPD

New Account No: Phone: 0207 237 3383 Fax: 0208 364 2939 Address and Postcode: 87 Broad Street

Old Account No: NHS Organisation Code: NHS Organisation Type: Clinic

Web Site Address: Status: Active

Notes: General Surgery OPD Department.

[Submit](#) [Home](#)

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Again after submitting and confirming you should receive a message confirming the creation of this account

Create Account GENERAL SURGERY OPD is complete

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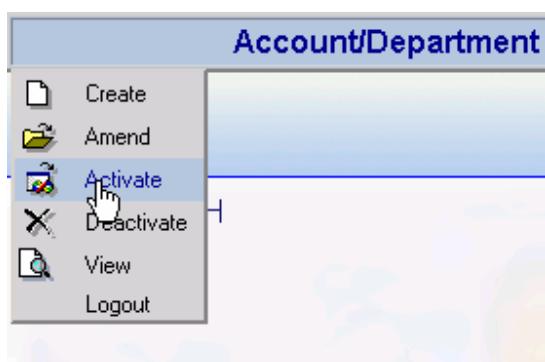
3.2.6 Activating/Deactivating Accounts

Once Customer accounts have been created, they need to be activated, before the customer can create users and login to make bookings.

The section shows what needs to be done to activate accounts. It also shows how to deactivate accounts that are no longer in use or that should not be used by Customers.

3.2.6.1 Activating a Customer Account

Select the 'Account/Department', Activate option from the main menu:



Then select the Organisation that is to be activated and click on the 'Search' button:

 A screenshot of a web application form titled 'Select Account to Activate'. The form is part of a larger interface with tabs at the top: 'Account/Department', 'User', 'Booking', 'Reports', and 'Admin'. The 'Account/Department' tab is selected. The form contains several input fields: 'Parent Organisation:' with a dropdown menu showing 'ANOTHER PCT', 'New Account No:', 'Postcode:', 'Old Account No:', 'Account Name:', and 'Account Type:' with a dropdown menu showing 'Customer'. A 'Search' button is located on the right side of the form.

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Account/Department	User	Booking	Reports	Admin																								
Select Account to Activate																												
<div> <div>Parent Organisation:</div> <div> <input type="text" value="ANOTHER PCT"/> </div> </div> <div> <div>New Account No:</div> <div> <input type="text"/> </div> </div> <div> <div>Postcode:</div> <div> <input type="text"/> </div> </div> <div> <div>Search</div> </div>																												
<div> <div>Old Account No:</div> <div> <input type="text"/> </div> </div> <div> <div>Account Name:</div> <div> <input type="text"/> </div> </div> <div> <div>Account Type:</div> <div> <input type="text" value="Customer"/> </div> </div>																												
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Organisation_ID	Name	Account_No	Address_1	Status_Desc	Org_type_Desc	PostCode	Org_Type																					
41961	ANOTHER PCT		134 PENDAL STREET	New	Customer	NW4 5RT	2																					
41962	GENERAL SURGERY OPD		87 BROAD STREET	New	Customer	NW4 3ER	2																					

Finally, click on the number that displays the Organisation's Account number:

Account/Department	User	Booking	Reports	Admin																								
Select Account to Activate																												
<div> <div>Parent Organisation:</div> <div> <input type="text" value="ANOTHER PCT"/> </div> </div> <div> <div>New Account No:</div> <div> <input type="text"/> </div> </div> <div> <div>Postcode:</div> <div> <input type="text"/> </div> </div> <div> <div>Search</div> </div>																												
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Organisation_ID	Name	Account_No	Address_1	Status_Desc	Org_type_Desc	PostCode	Org_Type																					
41961	ANOTHER PCT		134 PENDAL STREET	New	Customer	NW4 5RT	2																					
41962	GENERAL SURGERY OPD		87 BROAD STREET	New	Customer	NW4 3ER	2																					

You will then see all the details for this organisation to Submit and 'Activate' the Customer Account

Online Management of Interpretive Services (OMIS)	Version: 4.1
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OMIS

Account/Department User Booking Reports Admin

Activate Account

Account Type: Customer

Organisation (Parent/Self): ANOTHER PCT

Organisation Name / Department of Parent: ANOTHER PCT

New Account No: 41961

Phone: 0207 150 2832

Fax: 0207 384 4849

Address and Postcode: 134 PENDAL STREET

Old Account No:

NHS Organisation Code:

NHS Organisation Type: Clinic

LONDON

Web Site Address:

Status: New

NW4 5RT

Notes:

[Submit](#) [Home](#)

Stanford Systems UK Ltd Westminster NHS Primary Care Trust

You should see the confirmation screen showing that the customer's account has been activated.

Please note that you also need to create the Administrator for this Customer, who will then create Users that can then make bookings on the system.

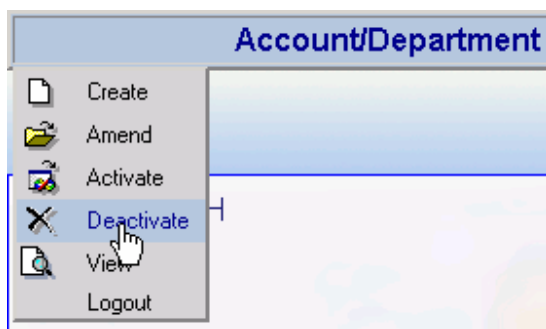
Also note that each of these users will need to be activated before they can login to make bookings.

Activate Account ANOTHER PCT is complete

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3.2.6.2 Deactivating a Customer Account

Select the 'Account/Department', Deactivate option from the main menu:



Select the 'Customer' account that needs to be deactivated and click on the 'Search' button as shown below:

The screenshot shows the OMIS 'Select Account to Deactivate' screen. It features a search form with the following fields: 'Parent Organisation' (dropdown menu showing 'ANOTHER PCT'), 'New Account No.', 'Postcode', 'Old Account No.', 'Account Name', and 'Account Type' (dropdown menu showing 'Customer'). A 'Search' button is located to the right of the form. Below the form is a table with the following data:

Organisation_ID	Name	Account_No	Address_1	Status_Desc	Org_type_Desc	PostCode	Org_Type
41961	ANOTHER PCT		134 PENDAL STREET	Active	Customer	NW4 5RT	2

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Click on the button showing the Customer account number to display the customer details and then press the Submit button to deactivate the Account:

Deactivate Account

Account Type: Customer
 Organisation (Parent/Self): ANOTHER PCT
 Organisation Name / Department of Parent: ANOTHER PCT
 New Account No: 41961
 Phone: 0207 150 2832
 Fax: 0207 384 4849
 Address and Postcode: 134 PENDAL STREET
 Old Account No:
 NHS Organisation Code:
 NHS Organisation Type: Clinic
 LONDON
 Web Site Address:
 Status: Active
 NW4 5RT

Notes

Submit Home

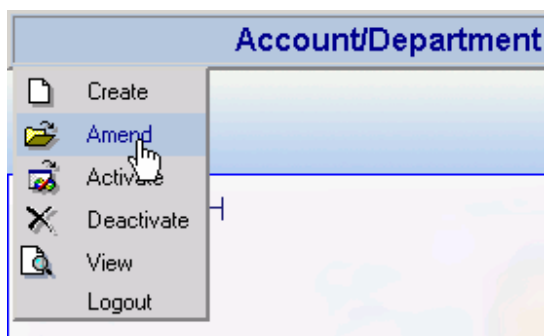
Again you should get the confirmation that the Customer account has been deactivated

Deactivate Account ANOTHER PCT is complete

Online Management of Interpretive Services (OMIS)	Version: 4.1
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3.2.7 Amend a Customer Account

This section described the tasks required to amend the details of an existing account. This may be necessary in case the address, phone number/fax or other details of the account need to be changed.



Select the Account/Department, Amend option from the menu as shown above and then select the organisation from the list or enter other search criteria to find the relevant Customer Account:

Organisation_ID	Name	Account_No	Address_1	Status_Desc	Org_type_Desc	PostCode	Org_Type
41961	ANOTHER PCT		134 PENDAL STREET	Deactivated	Customer	NW4 5RT	2
41962	GENERAL SURGERY OPD		87 BROAD STREET	New	Customer	NW4 3ER	2

You can search using the Account number, the postcode, the Old account number, part of the account name or selecting the 'Parent' (Account Holder) from the list and pressing the 'Search' button:

Once the Customer has been found, press the button with the account number to reveal the details for this customer:

Once you have made the changes to the Customer details, press the Submit button and confirm the update

Online Management of Interpretive Services (OMIS)	Version: 4.1
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OMIS

Account/Department User Booking Reports Admin

Amend Account

Account Type: Customer Organisation (Parent/Self): ANOTHER PCT Organisation Name / Department of Parent: ANOTHER PCT

New Account No: 41961 Phone: 0207 150 2832 Fax: 0207 384 4849 Address and Postcode: 134 PENDAL STREET

Old Account No: NHS Organisation Code: NHS Organisation Type: Clinic LONDON

Web Site Address: Status: Deactivated NW4 5RT

Notes:

[Submit](#) [Home](#)

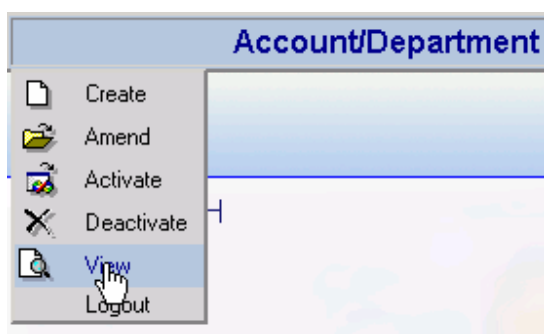
You should then receive the amendment confirmation message shown below:

Amend Account ANOTHER PCT is complete

Online Management of Interpretive Services (OMIS)	Version: 4.1
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3.2.8 Viewing Customer Account Details

In order to view customer details use the 'Account/Department', View option from the main menu:



Then select the organisation from the list or enter other search criteria to find the relevant Customer Account:

Account/Department	User	Booking	Reports	Admin																								
Select Account to View																												
<div> <div> Parent Organisation: <input type="text" value="ANOTHER PCT"/> </div> <div> New Account No: <input type="text"/> Postcode: <input type="text"/> </div> <div> Old Account No: <input type="text"/> Account Name: <input type="text"/> Account Type: <input type="text" value="Customer"/> </div> <div> <input type="button" value="Search"/> </div> </div>																												
<table border="1"> <thead> <tr> <th>Organisation_ID</th> <th>Name</th> <th>Account_No</th> <th>Address_1</th> <th>Status_Desc</th> <th>Org_type_Desc</th> <th>PostCode</th> <th>Org_Type</th> </tr> </thead> <tbody> <tr> <td>41961</td> <td>ANOTHER PCT</td> <td></td> <td>134 PENDAL STREET</td> <td>Deactivated</td> <td>Customer</td> <td>NW4 5RT</td> <td>2</td> </tr> <tr> <td>41962</td> <td>GENERAL SURGERY OPD</td> <td></td> <td>87 BROAD STREET</td> <td>New</td> <td>Customer</td> <td>NW4 3ER</td> <td>2</td> </tr> </tbody> </table>					Organisation_ID	Name	Account_No	Address_1	Status_Desc	Org_type_Desc	PostCode	Org_Type	41961	ANOTHER PCT		134 PENDAL STREET	Deactivated	Customer	NW4 5RT	2	41962	GENERAL SURGERY OPD		87 BROAD STREET	New	Customer	NW4 3ER	2
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41961	ANOTHER PCT		134 PENDAL STREET	Deactivated	Customer	NW4 5RT	2																					
41962	GENERAL SURGERY OPD		87 BROAD STREET	New	Customer	NW4 3ER	2																					

You can search using the Account number, the postcode, the Old account number, part of the account name or selecting the 'Parent' (Account Holder) from the list and pressing the 'Search' button:

Once the Customer has been found, press the button with the account number to reveal the details for this customer:

Once you have viewed the Customer details, press the 'Home' button to return to the home page.

Please note that you cannot amend any of the details for the Customer in the View option. You will need to use the 'Amend' option if changes are required.

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3.3 Maintaining Users

The OMIS administrator is responsible for maintaining users on the system. There are three types of users:

OMIS Users – Users working at the Host Site

Customer Users – Users at Customer sites

Interpreter Users – Users that provide the interpretive Services to Customers

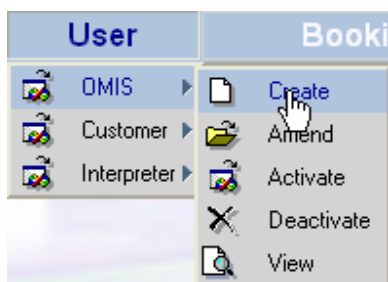
The OMIS Administrator requires access to all three types of users so that their details are as accurate as possible on the system. The administrator is also responsible for creating new user accounts and activating/deactivating accounts for users that join and have left the various organisations/positions.

3.3.1 OMIS Users

OMIS users need to be created by the OMIS Administrator. Their username and password can be set by the administrator and can later be changed by the user.

3.3.1.1 Create OMIS Users

In order to create a OMIS user, select the 'User', 'OMIS', 'Create' option from the main menu:



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Account/Department User Booking Reports Admin

Create OMIS User

User No:

Firstname: Surname: User Type: OMIS:

User Name: Password: Confirm Password: User Privilege: User Status:

Department: Phone: Fax: Mobile:

Email Address: Role: Job Title:

Notes:

Enter the details for the user/administrator as shown above, then submit and confirm the details.

Use the User Privilege selection to create an administrator or an ordinary user for the OMIS Account.

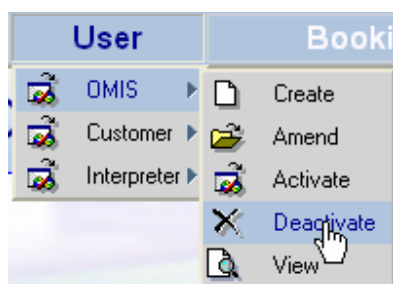
Create User New User is complete

Online Management of Interpretive Services (OMIS)	Version: 4.1
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3.3.1.2 Activate/Deactivate OMIS Users

Once users have been created, they normally need to be activated; however, OMIS users do not require activation. In order to activate a Customer 'User' see the next section.

Once users have left or moved to another department, their user account should be deactivated. This is done by selecting the 'User', 'OMIS', 'Deactivate' option from the main menu:



Then enter the 'Search' criteria to find the user you need to de-activate. Or just press the 'Search' button to list all the OMIS Users.

Account/Department	User	Booking	Reports	Admin				
Select OMIS User to Deactivate								
<div> <div> OMIS: Select </div> <div> New Staff No: <input type="text"/> </div> <div> Old Staff No: <input type="text"/> </div> <div> Surname: user </div> <div> User Type: OMIS </div> <div> Search </div> </div>								
User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use
9787	NEW	USER	0	OMIS	GRIP ORGANISATION	Activated	2	1

Then click on the user's number button to display the details

<div> <div> OMIS: Select </div> <div> New Staff No: <input type="text"/> </div> <div> Old Staff No: <input type="text"/> </div> <div> Surname: user </div> <div> User Type: OMIS </div> <div> Search </div> </div>								
User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use
9787	NEW	USER	0	OMIS	GRIP ORGANISATION	Activated	2	1

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Account/Department User Booking Reports Admin

Deactivate OMIS User

User No:

Firstname <input type="text" value="NEW"/>	Surname <input type="text" value="USER"/>	User Type <input type="text" value="OMIS"/>	OMIS: <input type="text" value="GRIP ORGANISATION"/>
User Name <input type="text" value="omisuser"/>	Password <input type="text" value="omis001"/>	Confirm Password <input type="text" value="omis001"/>	User Privilege <input type="text" value="Admin"/>
Department <input type="text" value="Front Office Manager"/>	Phone <input type="text" value="020 8243 2343"/>	Fax <input type="text" value="0207 384 3484"/>	Mobile <input type="text" value=""/>
Email Address <input type="text" value="omisuser@omis.com"/>	Role <input type="text" value="Administrator"/>	Job Title <input type="text" value="Front Office Manager"/>	<input checked="" type="checkbox"/> Email Confirmation

Notes

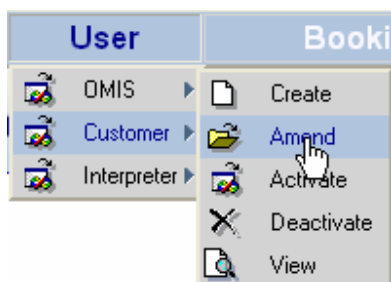
Amend the details for this user as required and then submit and confirm the details

Deactivate User NEW USER is complete

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3.3.1.3 Amend OMIS User Details

In order to amend OMIS user details select the 'User', 'OMIS', 'Amend' option from the Main Menu



Then select the user details by searching with the appropriate search criteria:

The screenshot shows a web interface titled 'Select OMIS User to Amend'. It has a navigation bar with 'Account/Department', 'User', 'Booking', 'Reports', and 'Admin'. The 'User' tab is active. Below the title, there are search fields: 'OMIS:' (a dropdown menu with 'Select' chosen), 'New Staff No.' (a text box), 'Old Staff No.' (a text box), 'Surname:' (a text box with 'user' entered), and 'User Type:' (a dropdown menu with 'OMIS' chosen). A 'Search' button is to the right. Below the search fields is a table with the following data:

User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use
9787	NEW	USER	0	OMIS	GRIP ORGANISATION	Deactivated	3	1

Then click on the button showing the User number:

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Account/Department User Booking Reports Admin

Amend OMIS User

User No:

Firstname: Surname: User Type: OMIS:

User Name: Password: Confirm Password: User Privilege: User Status:

Department: Phone: Fax: Mobile: ☒ Email Confirmation

Email Address: Role: Job Title:

Notes:

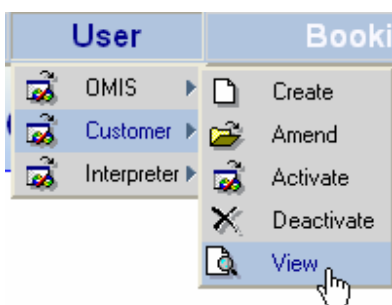
Then amend the details, submit and confirm the update.

Amend User NEW USER is complete

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.3.1.4 View OMIS User Details

In order to view User details without making any amendments use the 'User', 'OMIS', 'View' option from the main menu:



Then enter the appropriate search criteria to find the user:

The screenshot shows the 'Select OMIS User to View' screen. It includes search fields for OMIS, New Staff No., Old Staff No., Surname, and User Type. A 'Search' button is present. Below the search fields is a table of users.

User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use
9787	NEW	USER	0	OMIS	GRIP ORGANISATION	Deactivated	3	1

Click on the button that displays the User number and view the User's details. Then click on the 'Home' button to return to the Home Page.

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

OMIS

Account/Department User Booking Reports Admin

View OMIS User

User No:

Firstname:
 Surname:
 User Type:
 OMIS:

User Name:
 Password:
 Confirm Password:
 User Privilege:
 User Status:

Department:
 Phone:
 Fax:
 Mobile:
☒ Email Confirmation

Email Address:
 Role:
 Job Title:

Notes:

Online Management of Interpretive Services (OMIS)	Version: 4.1
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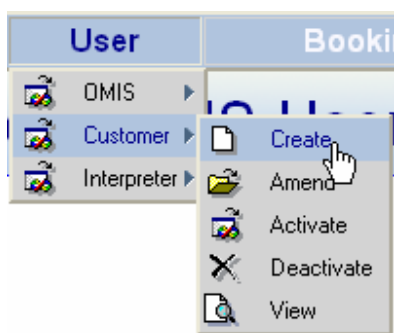
3.3.2 Customer Users

Customer users need to be created by the OMIS Administrator. Their username and password can be set by the administrator and can later be changed by the user. The Customer administrator can also be created by the Customer during registration. After activation, the Customer administrator can then create either administrators or users for their own organisation.

In this section the maintenance of Customer users is described so that OMIS administrators can carry out the appropriate tasks.

3.3.2.1 Create Customer Users

Customer users can be created by selecting the 'User', 'Customer', 'Create' option from the main menu:



Enter the details of the user and submit/confirm the details. Please note that the 'User Type' is set to 'Customer' by default and cannot be amended since a Customer user is being defined. You can also select the Organisation that the user belongs to in the 'Department' field.

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Account/Department	User	Booking	Reports	Admin
Create Customer User				
<div> <div>User No: <input type="text"/></div> <div> <div> <div>Firstname</div> <div>Customer</div> </div> <div> <div>Surname</div> <div>Person</div> </div> <div> <div>User Type</div> <div>Customer</div> </div> <div> <div>Department:</div> <div>ANOTHER PCT</div> </div> </div> <div> <div> <div>User Name</div> <div>custper</div> </div> <div> <div>Password</div> <div>cust001</div> </div> <div> <div>Confirm Password</div> <div>cust001</div> </div> <div> <div>User Privilege</div> <div>Admin</div> </div> <div> <div>User Status</div> <div>New</div> </div> </div> <div> <div> <div>Department</div> <div>Bookings</div> </div> <div> <div>Phone</div> <div>020 8243 2343</div> </div> <div> <div>Fax</div> <div>020 4323 3432</div> </div> <div> <div>Mobile</div> <div>07710 283843</div> </div> <div> <input type="checkbox"/> Email Confirmation </div> </div> <div> <div> <div>Email Address</div> <div>Cust.per@anotherPCT.nhs.uk</div> </div> <div> <div>Role</div> <div>Administrator</div> </div> <div> <div>Job Title</div> <div>Bookings Manager</div> </div> </div> <div> <div>Notes</div> <div> <div></div> </div> </div> </div>				
<div> <div>Submit</div> <div>Home</div> </div>				

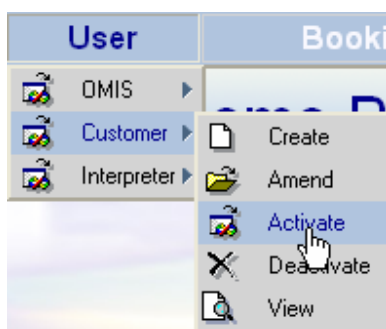
Create User Customer Person is complete

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.3.2.2 Activate/Deactivate Customer Users

Once users have been created, they normally need to be activated. Customer users can be activated by selecting the 'User', 'Customer' 'Activate' option from the main menu:

3.3.2.2.1 Activate Customer User



Then enter the appropriate search criteria and press the 'Search' button to find the user you need to deactivate.

Account/Department	User	Booking	Reports	Admin																		
Select Customer User to Activate																						
<div> <div>Customer Account Holder/Department:</div> <div> <input type="text" value="ANOTHER PCT"/> </div> </div> <div> <div>New Staff No:</div> <div> <input type="text"/> </div> </div> <div> <div>Old Staff No:</div> <div> <input type="text"/> </div> </div> <div> <div>Surname:</div> <div> <input type="text"/> </div> </div> <div> <div>User Type:</div> <div> <input type="text" value="Customer"/> </div> </div> <div> <input type="button" value="Search"/> </div>																						
<table border="1"> <thead> <tr> <th>User_No</th> <th>First_Name</th> <th>Surname</th> <th>Account_No</th> <th>Type of User</th> <th>Organisation</th> <th>Current Status</th> <th>Status</th> <th>User</th> </tr> </thead> <tbody> <tr> <td>9788</td> <td>CUSTOMER</td> <td>PERSON</td> <td>0</td> <td>Customer</td> <td>ANOTHER PCT</td> <td>Deactivated</td> <td>3</td> <td>2</td> </tr> </tbody> </table>					User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	User	9788	CUSTOMER	PERSON	0	Customer	ANOTHER PCT	Deactivated	3	2
User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	User														
9788	CUSTOMER	PERSON	0	Customer	ANOTHER PCT	Deactivated	3	2														

Then click on the button with the User number to display the details and activate the user account.

Online Management of Interpretive Services (OMIS)	Version: 4.1
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OMIS

Account/Department User Booking Reports Admin

Activate Customer User

User No: 9788

Firstname: CUSTOMER Surname: PERSON User Type: Customer Department: ANOTHER PCT

User Name: custper Password: cust001 Confirm Password: cust001 User Privilege: Admin User Status: Deactivated

Department: Bookings Phone: 020 8243 2343 Fax: 020 4323 3432 Mobile: 07710 283843 ☒ Email Confirmation

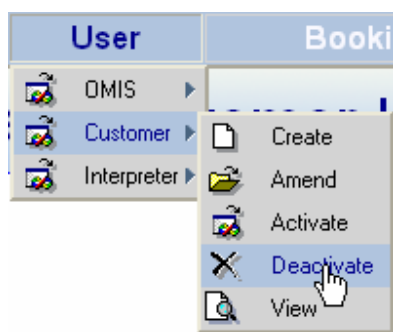
Email Address: Cust.per@anotherPCT.nhs.uk Role: Administrator Job Title: Bookings Manager

Notes

Submit Home

3.3.2.2.2 Deactivate Customer user

Once users have left the Customer Organisation or moved to another department, their user account should be deactivated. This is done by selecting the 'User', 'Customer', 'Deactivate' option from the main menu:



Online Management of Interpretive Services (OMIS)	Version: 4.1
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Then enter the appropriate search criteria and press the 'Search' button to find the user you need to deactivate.

Account/Department	User	Booking	Reports	Admin																	
Select Customer User to Deactivate																					
Customer Account Holder/Department: Select		New Staff No: 		<input type="button" value="Search"/>																	
Old Staff No: 	Surname: person	User Type: Customer																			
<table border="1"> <thead> <tr> <th>User_No</th><th>First_Name</th><th>Surname</th><th>Account_No</th><th>Type of User</th><th>Organisation</th><th>Current Status</th><th>Status</th><th>Use</th></tr> </thead> <tbody> <tr> <td>9788</td><td>CUSTOMER</td><td>PERSON</td><td>0</td><td>Customer</td><td>ANOTHER PCT</td><td>Activated</td><td>2</td><td>2</td></tr> </tbody> </table>					User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use	9788	CUSTOMER	PERSON	0	Customer	ANOTHER PCT	Activated	2
User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use													
9788	CUSTOMER	PERSON	0	Customer	ANOTHER PCT	Activated	2	2													

Then click on the user number button to display the user's details. Finally click on the Submit button and confirm to deactivate the Customer user's account

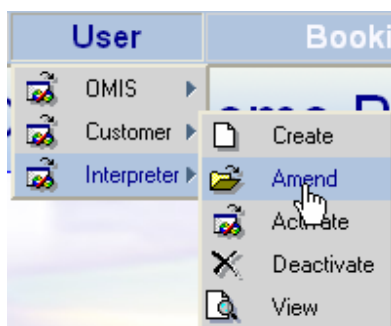
Account/Department	User	Booking	Reports	Admin
Deactivate Customer User				
<div> <div>User No: 9788</div> <div> <div> <div>Firstname</div> <div>CUSTOMER</div> </div> <div> <div>Surname</div> <div>PERSON</div> </div> <div> <div>User Type</div> <div>Customer</div> </div> <div> <div>Department:</div> <div>ANOTHER PCT</div> </div> </div> <div> <div> <div>User Name</div> <div>custper</div> </div> <div> <div>Password</div> <div>cust001</div> </div> <div> <div>Confirm Password</div> <div>cust001</div> </div> <div> <div>User Privilege</div> <div>Admin</div> </div> <div> <div>User Status</div> <div>Activated</div> </div> </div> <div> <div> <div>Department</div> <div>Bookings</div> </div> <div> <div>Phone</div> <div>020 8243 2343</div> </div> <div> <div>Fax</div> <div>020 4323 3432</div> </div> <div> <div>Mobile</div> <div>07710 283843</div> </div> <div> <div>Email Confirmation</div> <div><input checked="" type="checkbox"/></div> </div> </div> <div> <div> <div>Email Address</div> <div>Cust.per@anotherPCT.nhs.uk</div> </div> <div> <div>Role</div> <div>Administrator</div> </div> <div> <div>Job Title</div> <div>Bookings Manager</div> </div> </div> <div> <div>Notes</div> <div></div> </div> </div> <div> <div><input type="button" value="Submit"/></div> <div><input type="button" value="Home"/></div> </div>				

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Deactivate User CUSTOMER PERSON is complete

3.3.2.3 Amend Customer Users

In order to amend the user details for a Customer, Select the 'User', 'Customer', 'Amend' option from the main menu:



Enter the appropriate search criteria to find the user:

Account/Department	User	Booking	Reports	Admin																		
Select Customer User to Amend																						
<div> <div>Customer Account Holder/Department: Select</div> <div>New Staff No: <input type="text"/></div> <div>Old Staff No: <input type="text"/></div> <div>Surname: person</div> <div>User Type: Customer</div> <div>Search</div> </div>																						
<table border="1"> <thead> <tr> <th>User_No</th> <th>First_Name</th> <th>Surname</th> <th>Account_No</th> <th>Type of User</th> <th>Organisation</th> <th>Current Status</th> <th>Status</th> <th>Use</th> </tr> </thead> <tbody> <tr> <td>9788</td> <td>CUSTOMER</td> <td>PERSON</td> <td>0</td> <td>Customer</td> <td>ANOTHER PCT</td> <td>Deactivated</td> <td>3</td> <td>2</td> </tr> </tbody> </table>					User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use	9788	CUSTOMER	PERSON	0	Customer	ANOTHER PCT	Deactivated	3	2
User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use														
9788	CUSTOMER	PERSON	0	Customer	ANOTHER PCT	Deactivated	3	2														

Then click on the button with the user number that required amending:

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Account/Department	User	Booking	Reports	Admin
Amend Customer User				
<div> <div>User No: <input type="text" value="9788"/></div> </div>				
<div> <div>Firstname</div> <div>CUSTOMER</div> </div>	<div> <div>Surname</div> <div>PERSON</div> </div>	<div> <div>User Type</div> <div>Customer</div> </div>	<div> <div>Department:</div> <div>ANOTHER PCT</div> </div>	
<div> <div>User Name</div> <div>custper</div> </div>	<div> <div>Password</div> <div>cust001</div> </div>	<div> <div>Confirm Password</div> <div>cust001</div> </div>	<div> <div>User Privilege</div> <div>Admin</div> </div>	<div> <div>User Status</div> <div>Deactivated</div> </div>
<div> <div>Department</div> <div>Bookings</div> </div>	<div> <div>Phone</div> <div>020 8243 2343</div> </div>	<div> <div>Fax</div> <div>020 4323 3432</div> </div>	<div> <div>Mobile</div> <div>07710 283843</div> </div>	<div> <div><input checked="" type="checkbox"/> Email Confirmation</div> </div>
<div> <div>Email Address</div> <div>Cust.per@anotherPCT.nhs.uk</div> </div>		<div> <div>Role</div> <div>Administrator</div> </div>	<div> <div>Job Title</div> <div>Bookings Manager</div> </div>	
<div> <div>Notes</div> <div></div> </div>				
<div> <div>Submit</div> <div>Home</div> </div>				

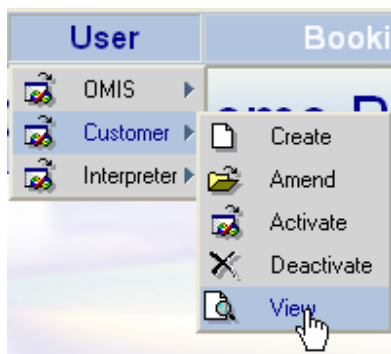
Amend the details and submit/confirm the details

Amend User CUSTOMER PERSON is complete

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3.3.2.4 View Customer Users

In order to View the Customer user details select the 'User', 'Customer', 'View' option from the Main Menu:



Then enter the appropriate search criteria to find the user's details:

Account/Department	User	Booking	Reports	Admin					
Select Customer User to View									
<div> <div>Customer Account Holder/Department:</div> <div>New Staff No:</div> </div> <div> <div>Select</div> <div></div> </div> <div> <div>Old Staff No:</div> <div>Surname:</div> <div>User Type:</div> </div> <div> <div></div> <div>person</div> <div>Customer</div> </div> <div>Search</div>									
	User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use
	9788	CUSTOMER	PERSON	0	Customer	ANOTHER PCT	Deactivated	3	2

Then click on the User Number button to display the details:

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Account/Department	User	Booking	Reports	Admin
View Customer User				
<div> <div>User No: 9788</div> </div>				
<div> <div>Firstname</div> <div>CUSTOMER</div> </div>	<div> <div>Surname</div> <div>PERSON</div> </div>	<div> <div>User Type</div> <div>Customer</div> </div>	<div> <div>Department:</div> <div>ANOTHER PCT</div> </div>	
<div> <div>User Name</div> <div>custper</div> </div>	<div> <div>Password</div> <div>cust001</div> </div>	<div> <div>Confirm Password</div> <div>cust001</div> </div>	<div> <div>User Privilege</div> <div>Admin</div> </div>	<div> <div>User Status</div> <div>Deactivated</div> </div>
<div> <div>Department</div> <div>Bookings</div> </div>	<div> <div>Phone</div> <div>020 8243 2343</div> </div>	<div> <div>Fax</div> <div>020 4323 3432</div> </div>	<div> <div>Mobile</div> <div>07710 283843</div> </div>	<div> <input checked="" type="checkbox"/> Email Confirmation </div>
<div> <div>Email Address</div> <div>Cust.per@anotherPCT.nhs.uk</div> </div>		<div> <div>Role</div> <div>Administrator</div> </div>	<div> <div>Job Title</div> <div>Bookings Manager</div> </div>	
<div> <div>Notes</div> <div></div> </div>				
<div> <div>Submit</div> <div>Home</div> </div>				

After viewing the details, click on the 'Home' button to return to the Home page. Please note that you cannot amend any User details in the View screen.

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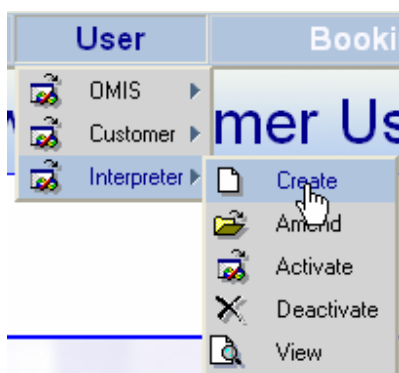
3.3.3 Interpreter Users

This section describes how to maintain Interpreter's details.

Interpreters require more information to be entered on their screen. This relates to the languages they can interpret, their grade and payment details, gender and address. These must be entered correctly to ensure that the interpreter's are paid the correct amount.

3.3.3.1 Create Interpreter Users

In order to create an Interpreter's account select the 'User', 'Interpreter', 'Create' option from the main menu.



Interpreter's details require additional information that relate to the Interpreter's payments. All these details must be entered for the interpreter to be setup correctly.

Enter details as shown below and submit/confirm.

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Then enter the appropriate search criteria to find the Interpreter:

User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use
9230	SILVIA	HUNTER	1154	Interpreter	SILVIA HUNTER	Activated	2	3
9789	JAMIE	HUNTER	2323	Interpreter	JAMIE HUNTER	Activated	2	3

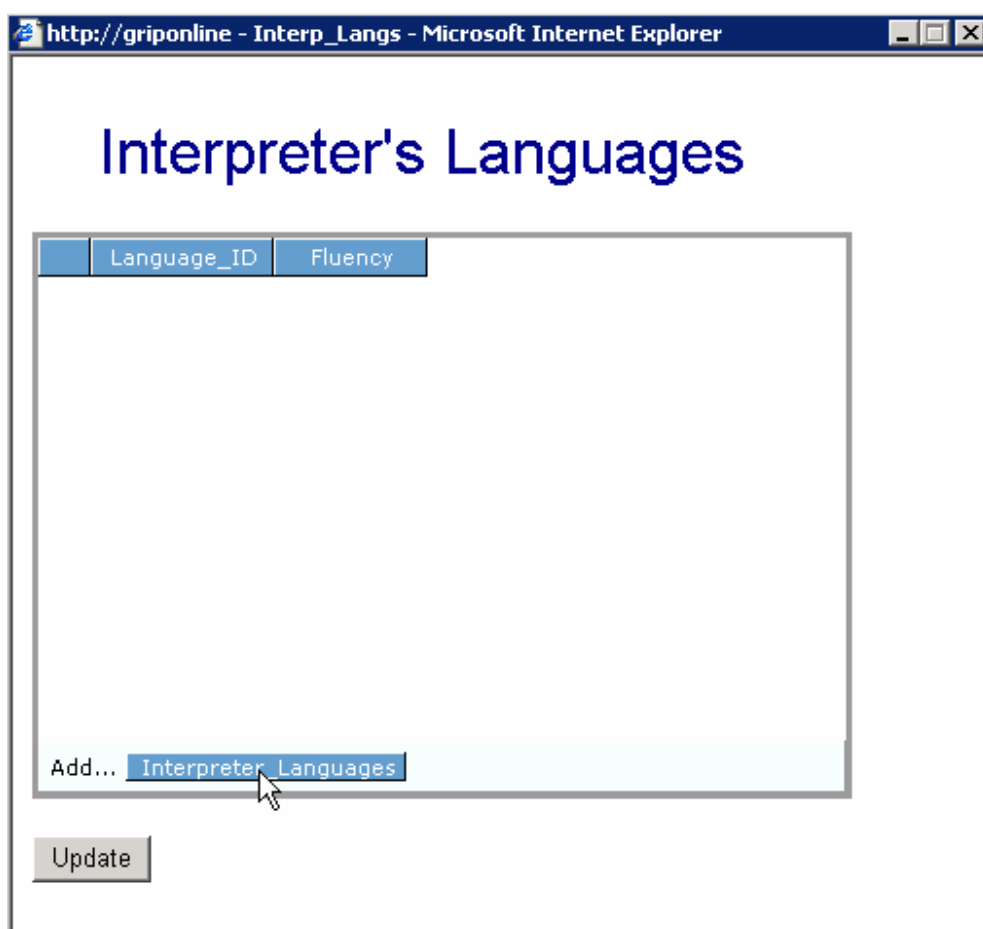
Then click on the button which contains the user number of the required interpreter:

When the interpreter's details are displayed, click on the 'Amend Languages' 'Search' button

In our case we have a new interpreter and no languages have been defined for this interpreter:

When the Pop-up window is displayed, click on the 'Add... Interpreter Languages' button

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Then the first row of the 'Grid' data entry will be displayed. Double click on the Language_ID blank section of the GRID

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http://griponline - Interp_Langs - Microsoft Internet Explorer

Interpreter's Languages

Language_ID	Fluency
*	

Add... Interpreter_Languages

Update

Then from the Combo select the Interpreter's Language

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http://griponline - Interp_Langs - Microsoft Internet Explorer

Interpreter's Languages

Language_ID	Fluency
* Arabic	
25	Amharic 2
1	Arabic 1
33	Armenian 3
81	Asanti 3
58	Belarusian 3
5	Benqali 1

Add... Interpreter_Languages

Update

To add another Language, click on the Add...Interpreter Languages and repeat the above actions

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http://griponline - Interp_Langs - Microsoft Internet Explorer

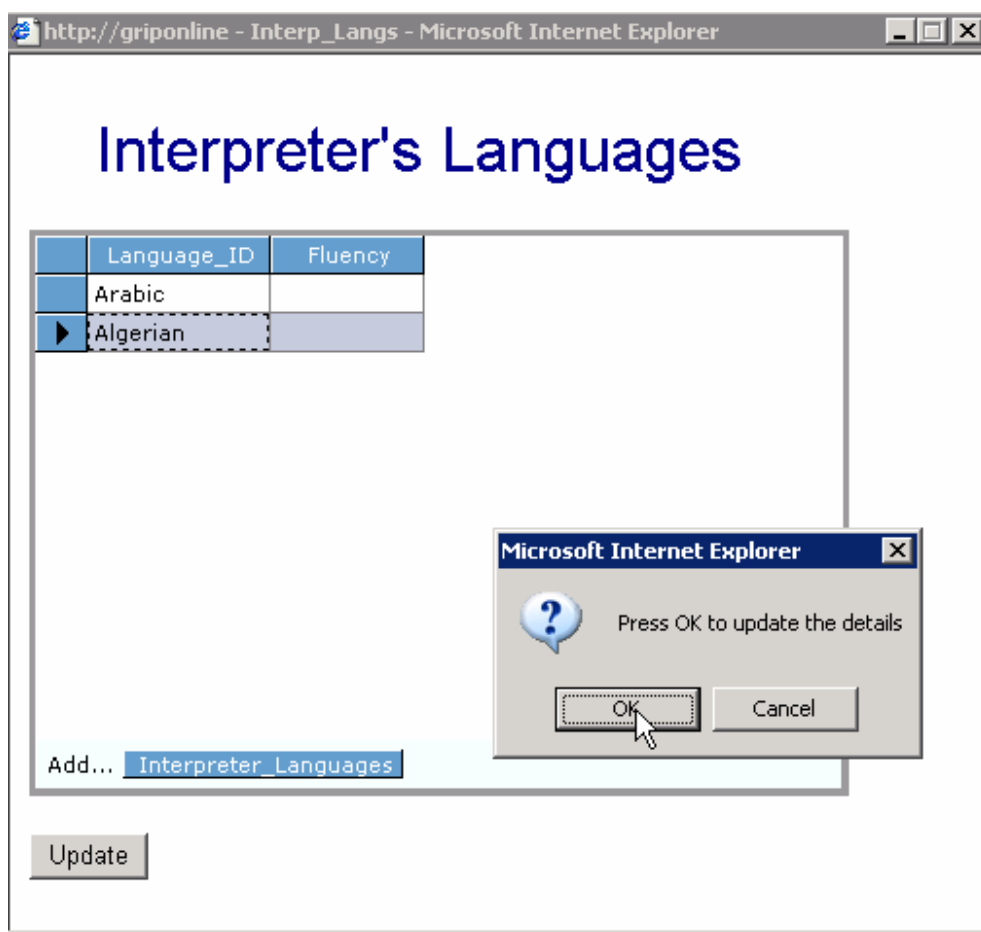
Interpreter's Languages

Language_ID	Fluency
* Arabic	

Add...

When all the Languages have been selected, Click on the 'Update' button and press 'OK' to confirm the update.

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Then close the window and amend any other changes you may require for the Interpreter. Finally submit the changes and confirm to update.

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User No:	<input type="text" value="9789"/>		
First Name	Surname	User Type	Interpreter:
JAMIE	HUNTER	Interpreter	JAMIE HUNTER
User Name	Password	Confirm Password	User Privilege
jamhum	jam001	jam001	Admin
Department	Phone	Fax	User Status
Interpreter	020 8243 2343	020 4323 3432	Activated
Email Address	Role		Mobile
jamie.hunter@nhs.net	Administrator		07710 283843
Notes	Job Title		<input checked="" type="checkbox"/> Email Confirmation

Microsoft Internet Explorer

Press OK to Update the record

OK Cancel

Interpreter Details		Amend Languages		<input type="button" value="Search"/>	
Account No	Personnel No	Gender	Grade	Full Time	Self Employed
2323	2342332	Male	Grade A	No	No
Send Appointment Details By:		Out of Hours:	NI Number		
Unknown		No			
Address:		Postcode			
134 PROWESS STREET					
LONDON					
W3 4RY					

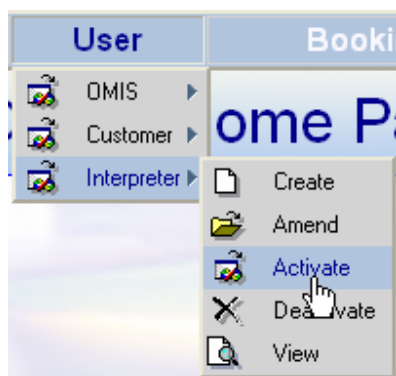
Amend User JAMIE HUNTER is complete

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3.3.3.3 Activate/Deactivate Interpreter Users

In order to activate an interpreter, select the 'User', 'Interpreter', 'Activate' option from the main menu

3.3.3.3.1 Activating Interpreters



Enter the appropriate search criteria and the click on the 'Search' button. In this case we knew the Interpreter's User Number and this was used to search for the interpreter. You can also use the Interpreter's surname (or beginning of the Surname) to search.

Account/Department	User	Booking	Reports	Admin																		
Select Interpreter User to Activate																						
<div> <div>Interpreter:</div> <div> <input type="text" value="Select"/> </div> </div> <div> <div>New Staff No:</div> <div><input type="text"/></div> </div> <div> <div>Old Staff No:</div> <div><input type="text"/></div> </div> <div> <div>Surname:</div> <div><input type="text" value="hunter"/></div> </div> <div> <div>User Type:</div> <div><input type="text" value="Interpreter"/></div> </div> <div> <div>Search</div> </div>																						
<table border="1"> <thead> <tr> <th>User_No</th> <th>First_Name</th> <th>Surname</th> <th>Account_No</th> <th>Type of User</th> <th>Organisation</th> <th>Current Status</th> <th>Status</th> <th>Use</th> </tr> </thead> <tbody> <tr> <td>9789</td> <td>JAMIE</td> <td>HUNTER</td> <td>2323</td> <td>Interpreter</td> <td>JAMIE HUNTER</td> <td>Deactivated</td> <td>3</td> <td>3</td> </tr> </tbody> </table>					User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use	9789	JAMIE	HUNTER	2323	Interpreter	JAMIE HUNTER	Deactivated	3	3
User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use														
9789	JAMIE	HUNTER	2323	Interpreter	JAMIE HUNTER	Deactivated	3	3														

Click on the Interpreter's number button to display the details

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Activate Interpreter User

User No:	<input type="text" value="9789"/>						
Firstname	Surname	User Type	Interpreter:				
JAMIE	HUNTER	<input type="text" value="Interpreter"/>	<input type="text" value="JAMIE HUNTER"/>				
User Name	Password	Confirm Password	User Privilege	User Status			
jamhum	jam001	jam001	Admin	Deactivated			
Department	Phone	Fax	Mobile	<input checked="" type="checkbox"/> Email Confirmation			
Interpreter	020 8243 2343	020 4323 3432	07710 283843				
Email Address	Role		Job Title				
jamie.hunter@nhs.net	Administrator						
Notes							
<div></div>							

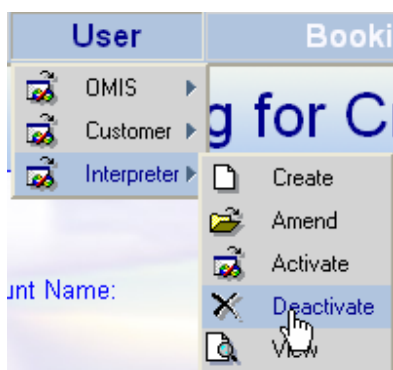
Interpreter Details		Amend Languages		<input type="button" value="Search"/>		
Account No	Personnel No	Gender	Grade	Full Time	Self Employed	NI Number
<input type="text" value="2323"/>	<input type="text" value="2342332"/>	<input type="text" value="Male"/>	<input type="text" value="Grade A"/>	<input type="text" value="No"/>	<input type="text" value="No"/>	<input type="text"/>
Send Appointment Details By:		Out of Hours:				
<input type="text" value="Unknown"/>		<input type="text" value="No"/>				
Address:			Postcode			
<input type="text" value="134 PROWESS STREET"/>			<input type="text"/>			
<input type="text" value="LONDON"/>						

Click on the 'Submit' button and confirm the update. The Interpreter will now be able to login and use the system.

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3.3.3.3.2 Deactivating Interpreters

In order to deactivate an Interpreter, select the 'User', 'Interpreter', 'Deactivate' option from the main menu



Enter the appropriate search criteria and click on the 'Search' button:

The screenshot shows the 'Select Interpreter User to Deactivate' form. The form has fields for 'Interpreter:' (a dropdown menu), 'New Staff No:', 'Old Staff No:', 'Surname:' (containing 'hunter'), and 'User Type:' (a dropdown menu). A 'Search' button is located to the right of the form. Below the form is a table of users.

User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use
9230	SILVIA	HUNTER	1154	Interpreter	SILVIA HUNTER	Activated	2	3
9789	JAMIE	HUNTER	2323	Interpreter	JAMIE HUNTER	Activated	2	3

Then click on the button which contains the Interpreters User number

When the Interpreter's details are displayed, click on the Submit button and then confirm the update:

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Deactivate Interpreter User

User No:	<input type="text" value="9789"/>				
Firstname	Surname	User Type	Interpreter:		
<input type="text" value="JAMIE"/>	<input type="text" value="HUNTER"/>	<input type="text" value="Interpreter"/>	<input type="text" value="JAMIE HUNTER"/>		
User Name	Password	Confirm Password	User Privilege	User Status	
<input type="text" value="jamhum"/>	<input type="text" value="jam001"/>	<input type="text" value="jam001"/>	<input type="text" value="Admin"/>	<input type="text" value="Activated"/>	
Department	Phone	Fax	Mobile	<input checked="" type="checkbox"/> Email Confirmation	
<input type="text" value="Interpreter"/>	<input type="text" value="020 8243 2343"/>	<input type="text" value="020 4323 3432"/>	<input type="text" value="07710 283843"/>		
Email Address	Role		Job Title		
<input type="text" value="jamie.hunter@nhs.net"/>	<input type="text" value="Administrator"/>		<input type="text" value=""/>		
Notes					
<input type="text" value="I"/>					

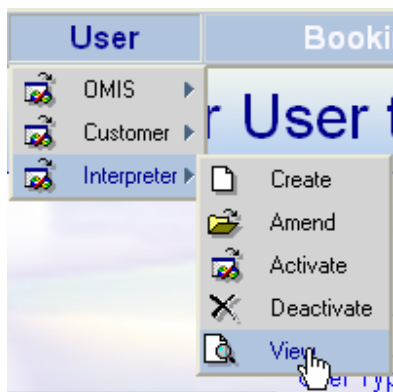
Interpreter Details		Amend Languages		<input type="button" value="Search"/>	
Account No	Personnel No	Gender	Grade	Full Time	Self Employed
<input type="text" value="2323"/>	<input type="text" value="2342332"/>	<input type="text" value="Male"/>	<input type="text" value="Grade A"/>	<input type="text" value="No"/>	<input type="text" value="No"/>
Send Appointment Details By:		Out of Hours:			
<input type="text" value="Unknown"/>		<input type="text" value="No"/>			
Address:		Postcode			
<input type="text" value="134 PROWESS STREET"/>		<input type="text" value=""/>			
<input type="text" value="LONDON"/>					
<input type="text" value="W3 4RY"/>					

Deactivate User JAMIE HUNTER is complete

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3.3.3.4 View Interpreter Users

In order to view Interpreter's details, click on the 'User', 'Interpreter', 'View' option from the main menu



Then enter the Interpreter's search criteria, such as surname or User Number and click on the 'Search' button

Account/Department	User	Booking	Reports	Admin					
Select Interpreter User to View									
<div> <div>Interpreter:</div> <div>Select</div> <div>New Staff No:</div> <div></div> <div>Old Staff No:</div> <div></div> <div>Surname:</div> <div>hunter</div> <div>User Type:</div> <div>Interpreter</div> <div>Search</div> </div>									
	User_No	First_Name	Surname	Account_No	Type of User	Organisation	Current Status	Status	Use
	9230	SILVIA	HUNTER	1154	Interpreter	SILVIA HUNTER	Activated	2	3
	9789	JAMIE	HUNTER	2323	Interpreter	JAMIE HUNTER	Deactivated	3	3

After viewing the Interpreter's details, click on the 'Home' button to return to the Home Page.

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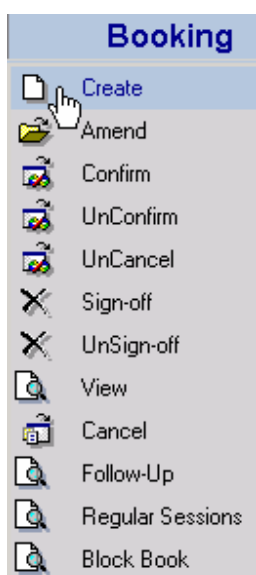
3.4 Bookings

This section describes the process for creating and maintaining bookings by OMIS staff. OMIS staff enter bookings on behalf of Customers where the booking information is sent by the customer by Fax. The 'Front Office staff create bookings, Back office staff then confirm and finally Sign-off the bookings.

This section will describe the entire process from Creation of Bookings to Sign-off and Invoicing of Bookings.

3.4.1 Booking Creation

To create a new booking, select the 'Booking', 'Create' option from the main menu:



3.4.1.1 Booking Search

To create a booking, you must first identify the Customer and the venue that the interpreter is to visit. This can be done by searching for the Customer Number (Usually supplied on the Fax supplied by the Customer), part of the account name, or the Postcode.

In our case we are going to make an appointment for the department we had created for 'General Surgery OPD' for 'Another PCT' account holder:

The account name for this department is 41957. This could also have been entered to search for the customer.

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Once the criteria has been entered and the 'Search' button pressed, a list of customers will be displayed that fit the criteria. Sometimes no customers are found and the list can be empty.

Organisation_ID	Name	Account_No	Address_1	Status_Desc	Org_type_Desc	PostCode	Org_Type	
41962	GENERAL SURGERY OPD		87 BROAD STREET	New	Customer	NW4 3ER	2	1

There are two important check fields on the search screen:

Display History – If this field is checked, then whenever the Booking is displayed, it will also display all the history associated with the Booking – i.e. Booked By (Who Created the Booking), Confirmed By (Who Confirmed the Booking), Sign-off By (Who Signed off the booking).

If this field is checked, it can make the booking screen too long, therefore you may prefer to leave the check off so that the minimum data is displayed.

Preserve Selection – The preserve selection check field allows you to move to other screens and then return to the Booking selection screen with the 'Search Criteria' preserved. E.g. if you choose a particular date range and an interpreter, then after amending the booking, when you return to the Selection screen, this criteria will be preserved. If you uncheck the field the selection data will be cleared and you will get blank selection criteria when you return to this screen.

To continue with the Booking creation – Click on the Button displaying the Customer number (41957) in this case.

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Create Booking

Patient Details		Booking Status: <input type="text" value="Unconfirmed"/>	Organisation: <input type="text" value="GENERAL SURGERY OPD"/>
Firstname <input type="text" value="Elliot"/>	Surname <input type="text" value="Brown"/>	Date of Birth <input type="text" value=""/>	Gender <input type="text" value="Unknown"/>
Other Reference Number Type <input type="text" value="Patient ID"/>	Other Reference Number <input type="text" value="345435"/>	Postcode <input type="text" value=""/>	NHSNumber <input type="text" value=""/>
Language <input type="text" value="French"/>	GP Code <input type="text" value=""/>	GP Name <input type="text" value=""/>	
Booking Details		<input type="checkbox"/> Confirmation Required	Job Status: <input type="text" value="Standard"/> Job Number: <input type="text" value=""/>
Appointment Date <input type="text" value="13/10/2004"/>	Appointment Time <input type="text" value="13:40"/>	Hrs <input type="text" value="0"/>	Minutes <input type="text" value="0"/>
		Venue Address (if different from site address) <input type="text" value="87 BROAD STREET"/>	
		County <input type="text" value=""/>	Postcode <input type="text" value="NW4 3ER"/>
		Venue phone <input type="text" value="0207 237 3383"/>	
Preferred Interpreter Gender <input type="text" value="Unknown"/>	Service Type <input type="text" value="Language Interpretation"/>	Payment Code <input type="text" value="one"/>	Venue fax <input type="text" value="0208 364 2939"/>
No. Pats Reg Sess <input type="text" value=""/>	Location 1 <input type="text" value=""/>	Contact 1 <input type="text" value=""/>	Location 2 <input type="text" value=""/>
		Contact 2 <input type="text" value=""/>	
Caller Details			
<input type="text" value="Select"/>		<input type="button" value="Search"/>	
User No <input type="text" value=""/>	Name <input type="text" value=""/>		
Phone <input type="text" value=""/>	Fax <input type="text" value=""/>	Mobile <input type="text" value=""/>	email <input type="text" value=""/>
<input type="button" value="Print"/>	<input type="button" value="History"/>	<input type="button" value="Submit"/>	<input type="button" value="Home"/>

The minimum details in the form above have been entered. You can submit and confirm the booking. Note that the Caller details include all users that have been registered for the respective organisation.

If any of the Mandatory fields are missing, or there is an error in the data, the messages will be displayed at the top of the form in RED and a star next to the field associated with the error.

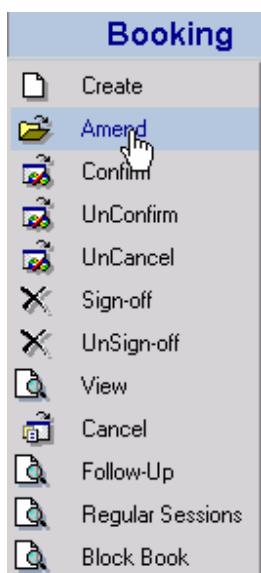
Once the booking has been created, a message will be displayed as follows: You may want to note the Booking number for future reference.

Create Booking for 607816 is complete

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3.4.2 Booking Amendments

To amend bookings use the 'Booking', 'Amend' option from the main menu



The Booking selection screen offers many fields that can be used to search for Bookings:

Old Job No: - This is job number from the 'previous' system.

Appointment Date – From or To. This allows you to enter a start and end date. All bookings found between these dates and that satisfy the rest of the criteria will be displayed

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Booking Ref – This is the booking reference number generated whenever a booking is created

Patient Surname – Enter the full or part of the patient's surname if required for the search

Interpreter – Select an interpreter from the list so that bookings that have been confirmed with this interpreter only will be displayed.

Language – Select a Language so that only bookings for the selected language will be displayed

Patient ID – Enter the Customer patient ID

Postcode – Enter the customer postcode, so that bookings in a particular area can be found.

Account/Department	User	Booking	Reports	Admin																
Select Booking for Amend																				
Old Job No:	<input type="text"/>	Appointment Date: From <input type="text"/> To <input type="text"/>	<input type="checkbox"/> Display History <input type="checkbox"/> Preserve Selection																	
Booking Ref:	<input type="text"/>	Patient Surname: <input type="text" value="brown"/>	<input type="button" value="Search"/> <input type="button" value="Int Cancel"/> <input type="button" value="Int Diary"/>																	
Language:	<input type="text" value="French"/>	Interpreter: <input type="text" value="Select"/>																		
Patient ID:	<input type="text"/>	Postcode: <input type="text"/>																		
<table border="1"> <thead> <tr> <th>Booking_ID</th> <th>Appointment Date</th> <th>Appointment Time</th> <th>Patient Language</th> <th>Job_No</th> <th>Pref Gender</th> <th>Status</th> <th>Interpreter</th> </tr> </thead> <tbody> <tr> <td>607816</td> <td>Oct 30, 2004</td> <td>15:00:00</td> <td>French</td> <td>0</td> <td>Unknown</td> <td>Unconfirmed</td> <td></td> </tr> </tbody> </table>					Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter	607816	Oct 30, 2004	15:00:00	French	0	Unknown	Unconfirmed	
Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter													
607816	Oct 30, 2004	15:00:00	French	0	Unknown	Unconfirmed														

For our example we have entered the patient's surname and the language to identify the relevant booking. When the booking has been found, click on the button that displays the booking reference number:

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Amend Booking							
Patient Details				Booking Status: Unconfirmed		Organisation: GENERAL SURGERY OPD	
Firstname ELLIOT		Surname BROWN		Date of Birth ▼		Gender Unknown	
Other Reference Number Type Patient ID		Other Reference Number 234234		Postcode 		NHSNumber 	
Language French		GP Code 		GP Name 			
Booking Details				<input type="checkbox"/> Confirmation Required		Job Status: Standard	
Appointment Date 30/10/2004		Appointment Time 15:00		Hrs 1		Minutes 0	
				Job Number: 607816			
<div style="border: 1px solid black; height: 100px; width: 100%;"></div>				Venue Address (If different from site address) 87 BROAD STREET			
							
							
Preferred Interpreter Gender Unknown		Service Type Language Interpretation		Payment Code one		Venue phone 0207 237 3383	
County 		Postcode NW4 3ER		Venue fax 0208 364 2939			
No. Pats Reg Sess 0	Location 1 	Contact 1 	Location 2 	Contact 2 			
Interpreter Assigned				Select Search Int Avail			
Sign-off							
Arrival Time * 		Interview Start * 		Interview * 		Appointment Outcome Customer DNA	
Customer Signoff Name: * 				Reason for Payment NA			
Appointment Notes: <div style="border: 1px solid black; height: 40px; width: 100%;"></div>							
Print History Submit Home							

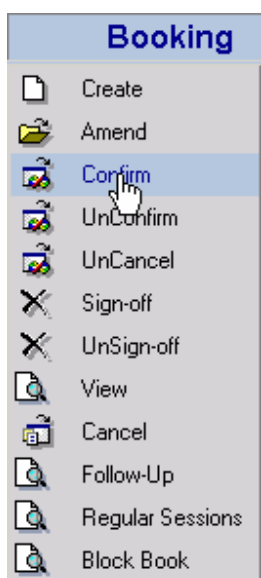
Amend any of the fields that require changes and then submit the changes:

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3.4.3 Booking Confirmation

Once Bookings have been created and amended, they will have a status of 'Unconfirmed'. This means that staff that are responsible for confirming bookings should only see these bookings.

When you select the 'Booking', 'Confirm' option from the main menu, only unconfirmed bookings will be displayed after you have entered the search criteria.



OMIS users that are responsible for confirmations usually work with interpreters for particular languages and will be working through the confirmation for a particular day. This reflects the criteria shown below as the date of 27/08/2004 for 'French' Bookings.

3.4.3.1 Viewing Interpreter's diary:

When a particular booking has been found, the OMIS user will need to find an appropriate interpreter. To help with this process pop-up screen can be used to displays the Interpreter's booked appointments:

Click on the 'Int Diary' button to display the Interpreter's booked appointment diary:

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Old Job No:	<input type="text"/>	Appointment Date:	From <input type="text"/>	To <input type="text"/>	<input type="checkbox"/> Display History
Booking Ref:	<input type="text"/>	Patient Surname:	<input type="text"/>		<input type="checkbox"/> Preserve Selection
Language:	<input type="text" value="French"/>	Interpreter:	<input type="text" value="Select"/>		<input type="button" value="Search"/>
Patient ID:	<input type="text"/>	Postcode:	<input type="text"/>		<input type="button" value="Int Cancel"/>
					<input type="button" value="Int Diary"/>

When the Pop-up screen is displayed, the language will be picked up by default (French in this case). Next, click on the Combo field to get a list of Active French Interpreter.

http://griponline - GP_Search - Microsoft Internet Explorer

Interpreter Diary

Language:

User_No	Name	Account_No	Hrs	Mins	Custom
918	BOUSSETTA, AHI	561			
903	VINHAS, ALCINO	483			
989	LE TEXIER, CATH	890			
1006	DONA, GIORGIN	1115			
9272	AOUF, HODA	1133			
9233	PARISI, KATIA	1151			
9225	DIFFERENCE, LAI	9225			
870	NGOC-TRAN, LE	182			

On selecting an Interpreter, all future appointments will be displayed:

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

http://griponline - GP_Search - Microsoft Internet Explorer

Interpreter Diary

Language:

	JobNo	Date	Time	Hrs	Mins	Customer
	605881	24 Aug 2004	09:00:00	4	0	LANARK MEDICAL CENTRE
	605922	24 Aug 2004	16:00:00	2	0	LANARK MEDICAL CENTRE
	605930	26 Aug 2004	09:00:00	4	0	LANARK MEDICAL CENTRE
	605982	31 Aug 2004	09:00:00	4	0	LANARK MEDICAL CENTRE
	605923	31 Aug 2004	16:00:00	2	0	LANARK MEDICAL CENTRE
	605931	02 Sep 2004	09:00:00	4	0	LANARK MEDICAL CENTRE
	601319	07 Sep 2004	17:15:00	1	0	RADIOLOGY
	604385	08 Oct 2004	16:45:00	1	0	NEUROLOGY
	602360	25 Oct 2004	14:15:00	1	0	PAEDIATRICS
	600080	08 Nov 2004	10:00:00	1	0	SERVICES FOR WOMEN - RAYMEDE CL

You should be able to evaluate whether the Interpreter is free on the date/time of the current appointment. In this case we can call the above Interpreter to see if he can attend our appointment on 27/08/2004 at 13:00.

To view the Interpreter's Phone number click on the List of Interpreters and scroll to the right:

Online Management of Interpretive Services (OMIS)	Version: 4.1
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http://griponline - GP_Search - Microsoft Internet Explorer

Interpreter Diary

Language:

AOUF, HODA

ID	Gender	Mobile	Phone	ns	Customer
Male	0772 930 6322	8257 5610			LANARK MEDICAL CENTRE
Male	07919953405	020 7240 3255			LANARK MEDICAL CENTRE
Female	078 7638 1483	7485 4016			LANARK MEDICAL CENTRE
Female	073 4773 8586	8451 2443			LANARK MEDICAL CENTRE
Female	079 7663 2886	8204 4499			LANARK MEDICAL CENTRE
Female	07952 693480	8488008%			LANARK MEDICAL CENTRE
Unknown		0208 880 4085			LANARK MEDICAL CENTRE
Male	079 5053 0689	7387 1462			RADIOLOGY
604385	08 Oct 2004	16:45:00	1	0	NEUROLOGY
602360	25 Oct 2004	14:15:00	1	0	PAEDIATRICS
600080	08 Nov 2004	10:00:00	1	0	SERVICES FOR WOMEN - RAYMEDE CL

Once interpreter's have been called, if they are not able to fulfil the appointment, another screen is available that allows you to capture this information.

3.4.3.2 Tracking Interpreter availability

If you click on the left of the booking details as shown below, a pop-up screen will be displayed that shows which interpreter's have been called and those that have rejected the appointment:

	Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter	M
	607744	Aug 27, 2004	09:40:00	French	0	Unknown	Unconfirmed		
	607815	Aug 27, 2004	13:00:00	French	0	Unknown	Unconfirmed		

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Account/Departme

Old Job No:

Booking Ref:

Language:

Patient ID:

Booking_ID	Appointment Date
607744	Aug 27, 2004
607815	Aug 27, 2004

Interpreters Available for - 607815 Update

Available	Interpreter	Account_No	Description	Mobile	Pho
<input type="checkbox"/>	AOUF, HODA	1133	Female	079 7663 2886	8204 44
<input checked="" type="checkbox"/>	BENJELLOUN, WAFAA	16	Female	079 5733 6261	8838 57
<input type="checkbox"/>	BOUSSETTA, AHMED	561	Male	0772 930 6322	8257 56
<input type="checkbox"/>	CALDWELL, SANDRINE THI MAI	1161	Female	078 0303 1389	8842 16
<input checked="" type="checkbox"/>	DIFFERENCE, LANGUAGE	9225	Unknown		0208 86
<input checked="" type="checkbox"/>	DONA, GIORGINA	1115	Female	073 4773 8586	8451 24
<input checked="" type="checkbox"/>	EL-SHALLALY, NAFISA	487	Female	079 9054 4312	
<input checked="" type="checkbox"/>	JENSEN, VANESSA	236	Female	0771156 9793	7394 00
<input checked="" type="checkbox"/>	KIAMATA, MUTUMPA	687	Male	079 5168 8936	7828 52
<input checked="" type="checkbox"/>	LANIADO ROSA, NATACHA S.	246	Female	079 5691 5767	7231 80
<input checked="" type="checkbox"/>	LE TEXIER, CATHERINE	890	Female	078 7638 1483	7485 40
<input checked="" type="checkbox"/>	MATUSA, LUYEYE	1146	Male	079 4981 1541	8969 28
<input checked="" type="checkbox"/>	NETWORK, PRESTIGE	9224	Unknown		
<input checked="" type="checkbox"/>	NGOC-TRAN, LE	192	Male	079 5053 0689	7387 14

The above screen shows that the interpreters Hoda Aouf, Ahmed Bousetta, Sandrine Caldwell and Giorgina Dona have been called and are not able to fulfil this appointment.

This information will stay with this appointment and any other staff viewing this data will be able to continue with the confirmation by calling other interpreters on the list. Make sure you click on the 'Update' button to save the changes.

If all the Interpreters have been called and none of them are able to attend the appointment, then the booking can be considered for allocating to an Agency.

To confirm the Booking, click on the button displaying the booking reference number.

Then select the interpreter appropriate for this booking

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Account/Department	User	Booking	Reports	Admin
Confirm Booking				
Patient Details Booking Status: Unconfirmed Organisation: GENERAL SURGERY OPD				
Firstname <input type="text" value="ELLIOT"/>	Surname <input type="text" value="BROWN"/>	Date of Birth <input type="text"/>	Gender Unknown	
Other Reference Number Type <input type="text"/>	Patient ID <input type="text"/>	Code <input type="text"/>	NHSNumber <input type="text"/>	
Language French	GP Name <input type="text"/>	Code <input type="text"/>	GP Name <input type="text"/>	
Booking Details Upd Status: Standard Job Number: 607816				
Appointment Date 30/10/2004	App 15:00	Address (If different from site address) <input type="text" value="ROAD STREET"/>		
Preferred Interpreter Gender Unknown	No. Pats Reg Sess <input type="text" value="0"/>	Location <input type="text"/>	Postcode <input type="text" value="NW4 3ER"/>	Venue phone <input type="text" value="0207 237 3383"/>
Interpreter Assigned Select	Venue fax <input type="text" value="0208 364 2939"/>	Location 2 <input type="text"/>	Contact 2 <input type="text"/>	
<div> <input type="button" value="Print"/> <input type="button" value="History"/> <input type="button" value="Submit"/> <input type="button" value="Home"/> </div>				

You can also access the Interpreter's diary and Availability tracking screen from within the booking screen. Use the 'Search' button to view the interpreter's diary and the 'Int Avail' button to track the interpreter's availability.

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Interpreters Available for - 607816 Update

Available	Interpreter	Account No	Description	Mobile	Phone
<input type="checkbox"/>	AOUF, HODA	1133	Female	079 7663 2886	8204 44
<input type="checkbox"/>	BENJELLOUN, WAFAA	16	Female	079 5733 6261	8838 57
<input type="checkbox"/>	BOUSSETTA, AHMED	561	Male	0772 930 6322	8257 56
<input checked="" type="checkbox"/>	CALDWELL, SANDRINE THI MAI	1161	Female	078 0303 1389	8842 16
<input checked="" type="checkbox"/>	DIFFERENCE, LANGUAGE	9225	Unknown		0208 88
<input type="checkbox"/>	DONA, GIORGINA	1115	Female	073 4773 8586	8451 24
<input checked="" type="checkbox"/>	EL-SHALLALY, NAFISA	487	Female	079 9054 4312	
<input type="checkbox"/>	JENSEN, VANESSA	236	Female	0771156 9793	7394 00
<input checked="" type="checkbox"/>	KIAMATA, MUTUMPA	687	Male	079 5168 8936	7828 52
<input checked="" type="checkbox"/>	LANIADO ROSA, NATACHA S.	246	Female	079 5691 5767	7231 80
<input checked="" type="checkbox"/>	LE TEXIER, CATHERINE	890	Female	078 7638 1483	7485 40
<input checked="" type="checkbox"/>	MATUSA, LUYEYE	1146	Male	079 4981 1541	8969 28
<input checked="" type="checkbox"/>	NETWORK, PRESTIGE	9224	Unknown		
<input checked="" type="checkbox"/>	NGOC-TRAN, LE	192	Male	079 5053 0689	7387 14
<input checked="" type="checkbox"/>	PARTI KATTA	1151	Female	07952 693480	848800

County: Postcode: NW4 3ER Venue phone: 0207 237 3383

When the booking has been confirmed a message will be displayed as follows:

Confirm Booking for 607816 is complete

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3.4.3.3 Booking Lock

There may be occasions when a booking is being confirmed at the same time that a user wants to amend the booking. For example a Customer that has created a booking, may want to amend the time of appointment. If OMIS users are trying to confirm the appointment at the same time, this can cause problems. In this case whoever enters the booking first for confirming or amending will 'Lock' the booking. The second or subsequent users trying to access the booking will receive a message that the booking is locked.

As an example, the customer is amending the booking we created earlier:

Account/Department		User	Booking
Amend Booking			
Patient Details Booking Status: <input type="text" value="Unconfirmed"/> Organisation: <input type="text" value="GENERAL SURGERY OPD"/>			
Firstname	Surname	Date of Birth	Gender
<input type="text" value="ELLIOT"/>	<input type="text" value="BRAUN"/>	<input type="text" value="12/05/1956"/>	<input type="text" value="Female"/>
Other Reference Number Type	Other Reference Number	Postcode	NHSNumber
<input type="text" value="Patient ID"/>	<input type="text" value="23423432"/>	<input type="text"/>	<input type="text"/>
Language	GP Code	GP Name	
<input type="text" value="French"/>	<input type="text"/>	<input type="button" value="Search"/> <input type="text"/>	
Booking Details <input type="checkbox"/> Confirmation Required Job Status: <input type="text" value="Standard"/> Job Number: <input type="text" value="607815"/>			
Appointment Date	Appointment Time	Hrs	Minutes
<input type="text" value="27/08/2004"/>	<input type="text" value="13:00"/>	<input type="text" value="1"/>	<input type="text" value="0"/>
Venue Address (If different from site address) <input type="text" value="189 PENDANT STREET"/> <input type="text" value="LONDON"/> <input type="text"/>		County Postcode Venue phone <input type="text"/> <input type="text" value="W3 4GY"/> <input type="text" value="020 7263 3732"/>	
Preferred Interpreter Gender <input type="text" value="Unknown"/>		Service Type <input type="text" value="Language Interpretation"/>	
Payment Code <input type="text" value="one"/>		Venue fax <input type="text" value="020 7353 8474"/>	
Location 1	Contact 1	Location 2	Contact 2
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Interpreter Assigned <input type="text" value="Select"/> <input type="button" value="Search"/>			
Sign-off			
Arrival Time *	Interview Start *	Interview *	Appointment Outcome
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Select"/>
Customer Signoff Name: *			Reason for Payment
<input type="text"/>			<input type="text" value="NA"/>
Appointment Notes:			
<input type="text"/>			
<input type="button" value="Print"/> <input type="button" value="History"/> <input type="button" value="Submit"/> <input type="button" value="Cancel"/>			

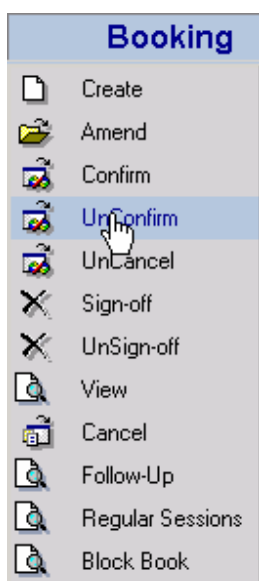
At the same time an OMIS user is attempting to confirm the booking. In this case, the OMIS user will receive a message that the Booking has been locked by the Customer.

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3.4.4 Un-confirming Bookings

There are occasions when a confirmed booking needs to be unconfirmed. This allows the booking to go back into the pool on unconfirmed bookings so that OMIS user can find another interpreter for this booking.

To change the status of a booking to unconfirmed use the 'Booking', 'Unconfirm' options from the main menu:



We have used our selection criteria as appointment date of 27/08/2004 and the Language as French:

Account/Department	User	Booking	Reports	Admin																		
Select Booking for UnConfirm																						
Old Job No:	<input type="text"/>	Appointment Date:	From <input type="text" value="30/10/2004"/> To <input type="text"/>	<input type="checkbox"/> Display History																		
Booking Ref:	<input type="text"/>	Patient Surname:	<input type="text"/>	<input type="checkbox"/> Preserve Selection																		
Language:	<input type="text" value="Select"/>	Interpreter:	<input type="text" value="Select"/>	<input type="button" value="Search"/>																		
Patient ID:	<input type="text"/>	Postcode:	<input type="text"/>	<input type="button" value="Int Cancel"/>																		
				<input type="button" value="Int Diary"/>																		
<table border="1"> <thead> <tr> <th>Booking_ID</th> <th>Appointment Date</th> <th>Appointment Time</th> <th>Patient Language</th> <th>Job_No</th> <th>Pref Gender</th> <th>Status</th> <th>Interpreter</th> <th></th> </tr> </thead> <tbody> <tr> <td>607816</td> <td>Oct 30, 2004</td> <td>15:00:00</td> <td>French</td> <td>0</td> <td>Unknown</td> <td>Confirmed</td> <td>SMITH, MIRNA</td> <td>079 31</td> </tr> </tbody> </table>					Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter		607816	Oct 30, 2004	15:00:00	French	0	Unknown	Confirmed	SMITH, MIRNA	079 31
Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter															
607816	Oct 30, 2004	15:00:00	French	0	Unknown	Confirmed	SMITH, MIRNA	079 31														

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Click on the button with the Booking reference number to view the booking details. Add any notes to the booking details indicating the reason for Un-confirming.

Submit and press 'OK' to Un-confirm the booking:

OMIS

Account/Department User Booking Reports Admin

UnConfirm Booking

Patient Details Booking Status: Organisation:

Firstname: Surname: Date of Birth: Gender:

Other Reference Number Type: Other Reference Number: Postcode: NHSNumber:

Language: GP Code: GP Name:

Booking Details ☐ Confirmation Required **Job Status:** **Job Number:**

Appointment Date: **Appointment Time:** **Hrs:** **Minutes:** **Venue Address (If different from site address):**

County: **Postcode:** **Venue phone:**

Preferred Interpreter Gender: **Service Type:** **Payment Code:** **Venue fax:**

No. Pats Reg Sess: **Location 1:** **Contact 1:** **Location 2:** **Contact 2:**

Interpreter Assigned:

The message below will be displayed to show that the booking has been Un-Confirmed.

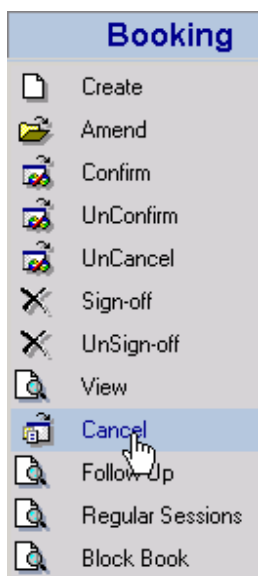
UnConfirm Booking for 607816 is complete

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3.4.5 Booking Cancellation

There are occasions when bookings need to be cancelled. When this is done, the job status of the booking will need to be amended to indicate the reason for cancellation:

To cancel a booking, select the 'Booking', 'Cancel' option from the main menu:



You first need to identify the Booking(s) that need to be cancelled. This time the criteria used is the Patient's Surname and Language

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter
607816	Oct 30, 2004	15:00:00	French	0	Unknown	Unconfirmed	

Click on the Booking Reference Number to View the Booking and change the status to Cancelled:

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Account/Department **User** **Booking** **Reports** **Admin**

Cancel Booking

Patient Details Booking Status: Organisation:

Firstname **Surname** **Date of Birth** **Gender**

Other Reference Number Type **Other Reference Number** **Postcode** **NHSNumber**

Patient ID **Language** **GP Code** **GP Name**

Booking Details ☐ Confirmation Required **Job Status:** **Job Number:**

Appointment Date **Appointment Time** **Hrs** **Minutes** **Venue Address (if different)**

County **Venue phone** **Venue fax**

Preferred Interpreter Gender **Service Type** **Payment Code**

No. Pats Reg Sess **Location 1** **Contact 1** **Location 2** **Contact 2**

Interpreter Assigned

Before submitting for cancellation, select a reason, in this case 'Interpreter Cancelled'. Then submit the booking by clicking on the 'Submit' button and pressing the 'OK' button

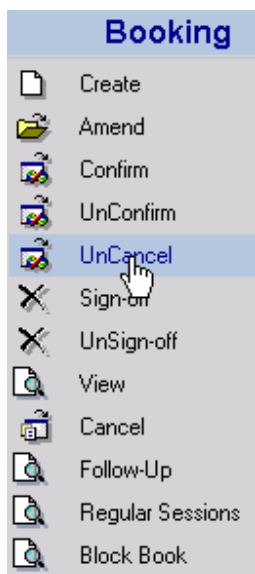
Cancel Booking for 607816 is complete

The message above confirms that the booking has been cancelled

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3.4.6 Booking UnCancellation

If the Booking needs to be UnCancelled, in case another Interpreter has been found who can fulfil the appointment, then use the 'Booking', 'UnCancel' option from the main menu.



Enter the Booking reference number or other search criteria to find the Booking to be cancelled:

Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter
607816	Oct 30, 2004	15:00:00	French	0	Unknown	Cancelled	

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Click on the Booking Reference number button

OMIS

Account/Department User Booking Reports Admin

UnCancel Booking

Patient Details Booking Status: Cancelled Organisation: GENERAL SURGERY OPD

Firstname ELLIOT **Surname** BROWN **Date of Birth** **Gender** Unknown
Other Reference Number Type **Other Reference Number** 234234 **Postcode** **NHSNumber**
Patient ID **Language** French **GP Code** **GP Name**

Booking Details ☐ Confirmation Required **Job Status:** Interpreter Cancell **Job Number:** 607816

Appointment Date 30/10/2004 **Appointment Time** 15:00 **Hrs** 1 **Minutes** 0 **Venue Address (if different from site address)** 87 BROAD STREET
County **Postcode** NW4 3ER **Venue phone** 0207 237 3383
Preferred Interpreter Gender Unknown **Service Type** Language Interpretation **Payment Code** one **Venue fax** 0208 364 2939
No. Pats Reg Sess 0 **Location 1** **Contact 1** **Location 2** **Contact 2**

Interpreter Assigned Select Search Int Avail

Print History Submit Home

Press the 'Submit' button and then 'OK' to uncancel the Booking

The following message should be displayed with the booking reference number that was Uncancelled:

UnCancel Booking for 607816 is complete

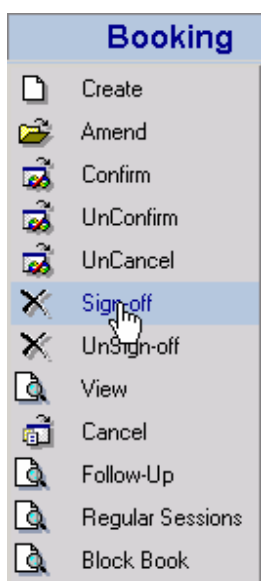
The status of Bookings that are Uncancelled is set to 'UnConfirmed'

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3.4.7 Booking Sign-off

Once Bookings have been confirmed and the Interpreter has completed the appointment, a completed Job Form is returned to OMIS users indicating that the Booking can be included in the end of month Batch Run for payment.

For Bookings to allow invoicing to Customers and Payment to Interpreters, the Bookings must be Signed-off. The menu options that allow this are as follows:



Select the 'Booking', 'Sign-off' option from the main menu:

Future bookings cannot be signed off; therefore only completed bookings will be displayed. The OMIS users need to cross-check the information on the Job Form with the information on the Booking before the Sign-off.

The Signoff forms are received from interpreters are kept in chronological order, therefore a batch of these can be selected at once for multiple signoffs. This is possible by selecting a list of all the signoffs for an Interpreter and then using the 'Next' or 'Skip' button to move to the next selected booking. The skip button is useful in case a Job Form has not been returned by the Interpreter.

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Account/Department	User	Booking	Reports	Admin																		
Select Booking for Sign-off																						
Old Job No:	<input type="text"/>	Appointment Date:	From <input type="text" value="01/09/2004"/> To <input type="text" value="30/09/2004"/>	<input type="checkbox"/> Display History																		
Booking Ref:	<input type="text"/>	Patient Surname:	<input type="text"/>	<input type="checkbox"/> Preserve Selection																		
Language:	<input type="text" value="Select"/>	Interpreter:	<input type="text" value="MIRNA SMITH"/>	<input type="button" value="Search"/>																		
Patient ID:	<input type="text"/>	Postcode:	<input type="text"/>	<input type="button" value="Int Cancel"/>																		
				<input type="button" value="Int Diary"/>																		
<table border="1"> <thead> <tr> <th>Booking_ID</th> <th>Appointment Date</th> <th>Appointment Time</th> <th>Patient Language</th> <th>Job_No</th> <th>Pref Gender</th> <th>Status</th> <th>Interpreter</th> <th></th> </tr> </thead> <tbody> <tr> <td>607816</td> <td>Sep 09, 2004</td> <td>15:00:00</td> <td>French</td> <td>0</td> <td>Unknown</td> <td>Confirmed</td> <td>SMITH, MIRNA</td> <td>079 313</td> </tr> </tbody> </table>					Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter		607816	Sep 09, 2004	15:00:00	French	0	Unknown	Confirmed	SMITH, MIRNA	079 313
Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter															
607816	Sep 09, 2004	15:00:00	French	0	Unknown	Confirmed	SMITH, MIRNA	079 313														

In our example case we only have one booking which needs to be signed off.

You can also use the Sign-off screen to create multiple Follow-ups. When in the Booking, the 'Follow-up' button can be used to create additional Follow-ups from the booking that is being signed-off.

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Sign-off Booking							
<div style="display: flex; justify-content: space-between;"> <div> Patient Details <div style="display: flex; justify-content: space-between;"> <div> Booking Status: Confirmed </div> <div> Organisation: GENERAL SURGERY OPD </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> Firstname <input type="text" value="ELLIOT"/> </div> <div> Surname <input type="text" value="BROWN"/> </div> <div> Date of Birth <input type="text"/> </div> <div> Gender <input type="text" value="Unknown"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> Other Reference Number Type <input type="text" value="Patient ID"/> </div> <div> Other Reference Number <input type="text" value="234234"/> </div> <div> Postcode <input type="text"/> </div> <div> NHSNumber <input type="text"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> Language <input type="text" value="French"/> </div> <div> GP Code <input type="text"/> </div> <div> GP Name <input type="text"/> </div> </div> </div> </div>							
<div style="display: flex; justify-content: space-between;"> <div> Booking Details <div style="display: flex; justify-content: space-between;"> <div> Appointment Date <input type="text" value="09/09/2004"/> </div> <div> Appointment Time <input type="text" value="15:00"/> </div> <div> Hrs <input type="text" value="1"/> </div> <div> Minutes <input type="text" value="0"/> </div> </div> </div> <div> <div style="display: flex; align-items: center;"> <input type="checkbox"/> Confirmation Required </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> Job Status: Interpreter Cancell </div> <div> Job Number: 607816 </div> </div> </div> </div> <div style="margin-top: 5px;"> Venue Address (If different from site address) <input type="text" value="87 BROAD STREET"/> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> County <input type="text"/> </div> <div> Postcode <input type="text" value="NW4 3ER"/> </div> <div> Venue phone <input type="text" value="0207 237 3383"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> Preferred Interpreter Gender <input type="text" value="Unknown"/> </div> <div> Service Type <input type="text" value="Language Interpretation"/> </div> <div> Payment Code <input type="text" value="one"/> </div> <div> Venue fax <input type="text" value="0208 364 2939"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> No. Pats Reg Sess <input type="text" value="0"/> </div> <div> Location 1 <input type="text"/> </div> <div> Contact 1 <input type="text"/> </div> <div> Location 2 <input type="text"/> </div> <div> Contact 2 <input type="text"/> </div> </div>							
Caller Details <div style="display: flex; justify-content: space-between;"> <div> User No <input type="text"/> </div> <div> Name <input type="text"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> Phone <input type="text"/> </div> <div> Fax <input type="text"/> </div> <div> Mobile <input type="text"/> </div> <div> email <input type="text"/> </div> </div>							
Interpreter Assigned <div style="display: flex; justify-content: space-between;"> <div> <input type="text" value="MIRNA SMITH (428)"/> </div> <div> <input type="button" value="Search"/> </div> <div> <input type="button" value="Int Avail"/> </div> </div>							
Sign-off <div style="display: flex; justify-content: space-between;"> <div> Arrival Time * <input type="text"/> </div> <div> Interview Start * <input type="text"/> </div> <div> Interview * <input type="text"/> </div> <div> Appointment Outcome <input type="text" value="Customer DNA"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> Customer Signoff Name: * <input type="text"/> </div> <div> Reason for Payment <input type="text" value="NA"/> </div> </div> <div style="margin-top: 5px;"> Appointment Notes: <input style="height: 40px;" type="text"/> </div> <div style="text-align: right; margin-top: 10px;"> <input type="button" value="Follow-Up"/> </div>							
<div style="display: flex; justify-content: space-around;"> <input type="button" value="Print"/> <input type="button" value="History"/> <input type="button" value="Submit"/> <input type="button" value="Home"/> </div>							

To sign-off the booking you must enter the Arrival time, Interview start time, Interview end time, Appointment Outcome, Customer signoff name (From Job Form) and the Reason for Payment (If required).
If any of these fields are left empty an error message will be displayed.

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3.4.7.1 Creating Follow-ups from Sign-off

If you want to create a Follow-up from the Signoff, enter the sign-off details and click on the 'Follow-Up' button

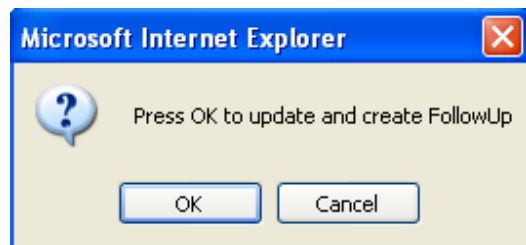
Firstname ELLIOT	Surname BRAUN	Date of Birth 12/05/1956	Gender Female
Other Reference Number Type Patient ID	Other Reference Number 23423432	Postcode	NHSNumber
Language French	GP Code	GP Name Search	

Booking Details		<input type="checkbox"/> Confirmation Required	Job Status: Interpreter Cancell	Job Number: 607815
Appointment Date 20/08/2004	Appointment Time 13:00	Hrs 1	Minutes 0	Venue Address (if different from site address) 189 PENDANT STREET
Please do not confirm this booking, It is for testing purposes only...		LONDON		
Preferred Interpreter Gender Unknown	Service Type Language Interpretation	Payment Code one	Postcode W3 4GY	Venue phone 020 7263 3732
Venue fax 020 7353 8474	Location 1	Contact 1	Location 2	Contact 2

Caller Details		Interpreter Assigned	
User No 9787	Name CUSTOMER PERSON	Interpreter Assigned HODA AOUF (1133)	Search Int Avail
Phone 020 8474 4784	Fax	Mobile	

Sign-off		Follow Up	
Arrival Time * 13:00	Interview Start * 13:15	Interview * 14:30	Appointment Outcome Standard
Customer Signoff Name: * Jo Bloggs		Reason for Payment NA	
Appointment Notes:			

Print History Submit Home



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OMIS

Account/Department User Booking Reports Admin

Follow-Up Booking

Patient Details Booking Status: Organisation:

Firstname **Surname** **Date of Birth** **Gender**
Other Reference Number Type **Other Reference Number** **Postcode** **NHSNumber**
Patient ID **Language** **GP Code** **GP Name**

Booking Details ☐ Confirmation Required **Job Status:** **Job Number:**

Appointment Date **Appointment Time** **Hrs** **Minutes** **Venue Address (If different from site address)**
County **Postcode** **Venue phone**
Preferred Interpreter Gender **Service Type** **Payment Code** **Venue fax**
No. Pats Reg Sess **Location 1** **Contact 1** **Location 2** **Contact 2**

Interpreter Assigned

Sign-off Booking for 607815 is complete

If the booking has been signed off without the follow-up requirement then you should get the message displayed above: otherwise the following message is displayed after a followup.

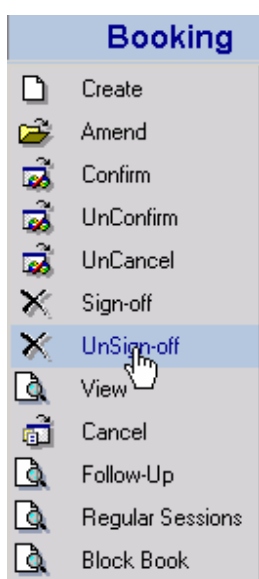
Follow-Up Booking for 607817 is complete

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3.4.8 Booking UnSignoff

There may be occasions when mistakes have been made with sign-offs and the booking needs to be Unsigned-off. This is only possible before the end of the month, when all the signed-off bookings are Invoiced (Status is changed to Invoiced)

In order to Unsign-off a booking use the following menu options:



Enter the relevant criteria to find the booking that needs to be signed off:

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OMIS

Account/Department User Booking Reports Admin

Select Booking for UnSign-off

Old Job No: Appointment Date: From To

Booking Ref: Patient Surname:

Language: Interpreter:

Patient ID: Postcode:

☐ Display History
☐ Preserve Selection

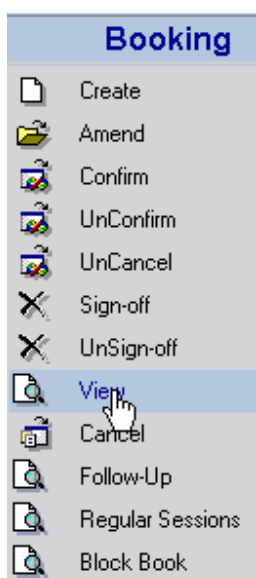
Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter	
607816	Sep 09, 2004	15:00:00	French	0	Unknown	Signed-off	SMITH, MIRNA	079 31

With the booking selected, click on the button with the booking reference number

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3.4.9 View Booking

To view a Booking, select the 'Booking', 'View' option from the main menu:



Enter the criteria to find the booking whose details need to be viewed.

Account/Department	User	Booking	Reports	Admin																		
Select Booking for View																						
Old Job No:	<input type="text"/>	Appointment Date:	From <input type="text"/>	To <input type="text"/>																		
Booking Ref:	<input type="text" value="607815"/>	Patient Surname:	<input type="text"/>																			
Language:	<input type="text" value="Select"/>	Interpreter:	<input type="text" value="Select"/>																			
Patient ID:	<input type="text"/>	Status of Booking:	<input type="text" value="Select"/>																			
		Postcode:	<input type="text"/>																			
<input type="checkbox"/> Display History <input type="checkbox"/> Preserve Selection <input type="button" value="Search"/> <input type="button" value="Int Cancel"/>																						
<table border="1"> <thead> <tr> <th>Booking_ID</th> <th>Appointment Date</th> <th>Appointment Time</th> <th>Patient Language</th> <th>Job_No</th> <th>Pref Gender</th> <th>Status</th> <th>Interpreter</th> <th></th> </tr> </thead> <tbody> <tr> <td>607815</td> <td>Aug 20, 2004</td> <td>13:00:00</td> <td>French</td> <td>0</td> <td>Unknown</td> <td>Confirmed</td> <td>AOUF, HODA</td> <td>079 766</td> </tr> </tbody> </table>					Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter		607815	Aug 20, 2004	13:00:00	French	0	Unknown	Confirmed	AOUF, HODA	079 766
Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter															
607815	Aug 20, 2004	13:00:00	French	0	Unknown	Confirmed	AOUF, HODA	079 766														

You may want to check the 'Display History' box so that all the details for this booking can be viewed:

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Click on the Booking reference number button to view the details for this booking:

This time the booking details will contain all the historic details such as: Caller details, Booked By, Confirmed By, Signed-off by, Interpreter details. This is because the 'Display History' box was switched on.

Booking_ID	Appointment Date	Appointment Time	Patient Language	Job_No	Pref Gender	Status	Interpreter	Mobile
601348	Jun 28, 2004	15:20:00	Arabic	0	Unknown	Signed-off	SMITH, MIRNA	079 3133 2689
604059	Jul 22, 2004	10:30:00	Arabic	0	Unknown	Signed-off	SMITH, MIRNA	079 3133 2689
607816	Sep 09, 2004	15:00:00	French	0	Unknown	Signed-off	SMITH, MIRNA	079 3133 2689

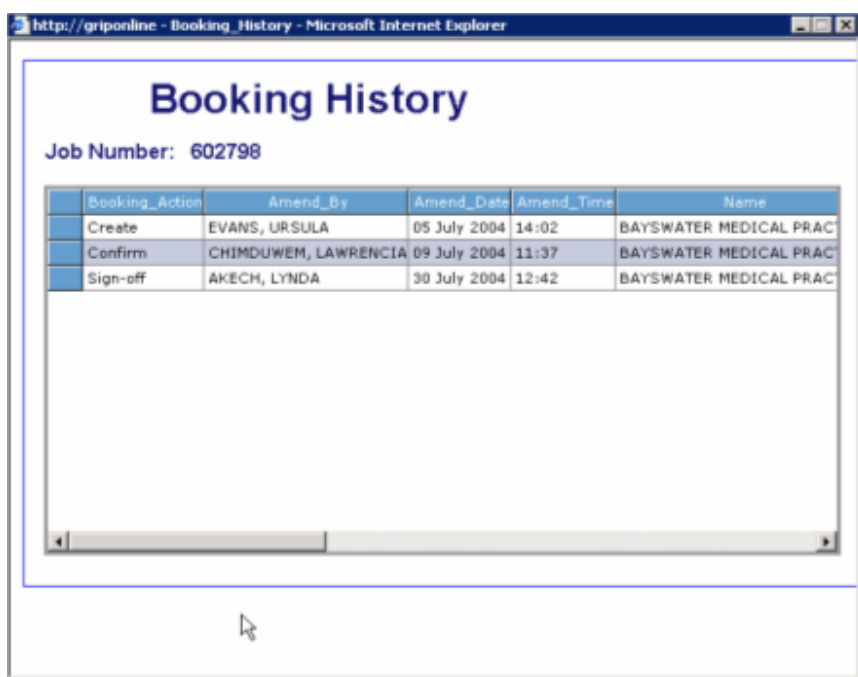
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Account/Department	User	Booking	Reports	Admin
View Booking				
Patient Details Booking Status: <input type="text" value="Signed-off"/> Organisation: <input type="text" value="GENERAL SURGERY OPD"/>				
Firstname <input type="text" value="ELLIOT"/>	Surname <input type="text" value="BROWN"/>	Date of Birth <input type="text"/>	Gender <input type="text" value="Unknown"/>	
Other Reference Number Type <input type="text" value="Patient ID"/>	Other Reference Number <input type="text" value="234234"/>	Postcode <input type="text"/>	NHSNumber <input type="text"/>	
Language <input type="text" value="French"/>	GP Code <input type="text"/>	GP Name <input type="text"/>		
Booking Details <input type="checkbox"/> Confirmation Required Job Status: <input type="text" value="Interpreter Cancell"/> Job Number: <input type="text" value="607816"/>				
Appointment Date <input type="text" value="09/09/2004"/>	Appointment Time <input type="text" value="15:00"/>	Hrs <input type="text" value="1"/>	Minutes <input type="text" value="0"/>	Venue Address (if different from site address) <input type="text" value="87 BROAD STREET"/>
<input type="text"/>		<input type="text"/>		
<input type="text"/>		County <input type="text"/>	Postcode <input type="text" value="NW4 3ER"/>	Venue phone <input type="text" value="0207 237 3383"/>
Preferred Interpreter Gender <input type="text" value="Unknown"/>	Service Type <input type="text" value="Language Interpretation"/>	Payment Code <input type="text" value="one"/>	Venue fax <input type="text" value="0208 364 2939"/>	
No. Pats Reg Sess <input type="text" value="0"/>	Location 1 <input type="text"/>	Contact 1 <input type="text"/>	Location 2 <input type="text"/>	Contact 2 <input type="text"/>
Interpreter Assigned <input type="text" value="MIRNA SMITH (428)"/> <input type="button" value="Search"/> <input type="button" value="Int Avail"/>				
Sign-off				
Arrival Time * <input type="text" value="12:35"/>	Interview Start * <input type="text" value="15:00"/>	Interview * <input type="text" value="17:00"/>	Appointment Outcome <input type="text" value="Customer DNA"/>	
Customer Signoff Name: * <input type="text" value="sdfdsf"/>			Reason for Payment <input type="text" value="NA"/>	
Appointment Notes: <input type="text"/>				

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3.4.10 Booking History

To view full history of a booking click on the 'History' button when the booking is open:



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3.4.11 Print Booking

To print booking details, click on the 'Print' button when the booking is open:

Then enter any additional details that you may want to add to the booking and click on the 'Submit' button:

Account/Department	User	Booking	Reports	Admin
<div> <div> Booking ID: <input type="text" value="602798"/> </div> <div> Notes: <input type="text" value="Note for Booking"/> </div> </div>				
<div> <div> Home Visit Details: <input type="text" value="Home address if required"/> </div> <div> Authorised By: <input type="text" value="Booking Manager"/> </div> </div>				
<div> <input type="button" value="Submit"/> <input type="button" value="Home"/> </div>				

The print preview will be displayed as a report. You can amend the details before the final print/email using Word or Adobe PDF format.

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Booking Details

Westminster PCT NHS

St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ



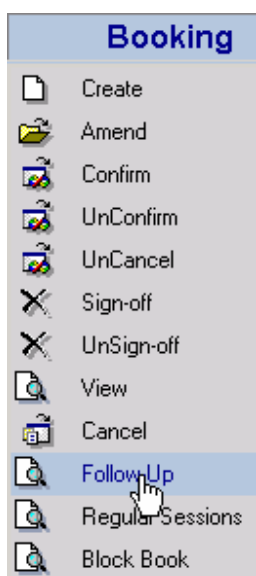
DateOfBirth

Booking	602798		
Language:	Portuguese		
Date:	16-Jul-2004		
Time:	8:30 am		
Duration:	1 Hrs 0 Mins		
Location:	BAYSWATER MEDICAL PRACTICE 46 CRAVEN ROAD		
	LONDON	W2 3QA	
Phone:	020 7402 2073		
Contact:	Home Visit: Home address if required		
Contact Phone:			
Pref Gender:	Unknown		
Authorised By:	Booking Manager		
Patient Name:	ROSA GONCALVES	DOB:	04-Jul-1973
Patient Reference:			

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3.4.12 Follow-Up Bookings

To create Follow-Up bookings use the 'Booking', 'Follow-Up' option from the main menu



Enter the Booking Reference number of the booking that is to be used for the Follow-up

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Enter the Appointment Date and Time. You can then submit and save the Follow-up or use the 'Next' button to create more follow-ups from this one booking.

OMIS

Account/Department User Booking Reports Admin

Follow-Up Booking

Patient Details Booking Status: Organisation:

Firstname **Surname** **Date of Birth** **Gender**
Other Reference Number Type **Other Reference Number** **Postcode** **NHS Number**
Language **GP Code** **GP Name**

Booking Details ☐ Confirmation Required **Job Status:** **Job Number:**

Appointment Date **Appointment Time** **Hrs** **Minutes**
Venue Address (if different from site address)
County **Postcode** **Venue phone**
Service Type **Payment Code** **Venue fax**
Location 1 **Contact 1** **Location 2** **Contact 2**

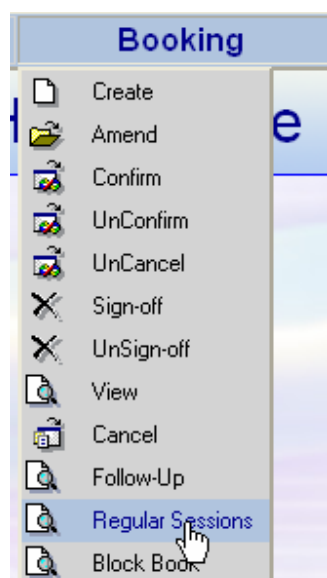
Interpreter Assigned

Follow-Up Booking for 607818 is complete

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3.4.13 Creating Regular Sessions

To create Regular Sessions, use the 'Booking', 'Regular Session' option from the main menu



Enter the booking reference number that is to be used to create the regular sessions

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OMIS

Account/Department User Booking Reports Admin

Regular Sessions Booking

Patient Details Booking Status: Organisation:

Firstname **Surname** **Date of Birth** **Gender**
Other Reference Number Type **Other Reference Number** **Postcode** **NHSNumber**
Patient ID **Language** **GP Code** **GP Name**

Booking Details ☐ Confirmation Required **Job Status:** **Job Number:**

Appointment Date **Appointment Time** **Hrs** **Minutes** **Venue Address (If different from site address)**
County **Postcode** **Venue phone**
Preferred Interpreter Gender **Service Type** **Payment Code** **Venue fax**
No. Pats Reg Sess **Location 1** **Contact 1** **Location 2** **Contact 2**

Interpreter Assigned

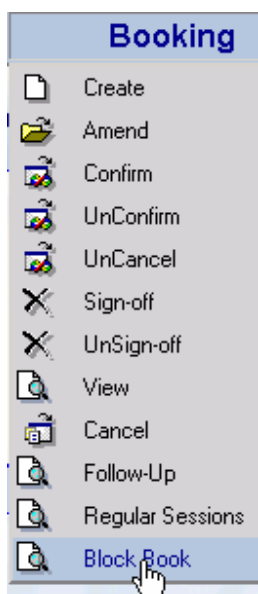
Enter the Appointment Date and then use the 'Next' or the 'Submit' button to create another Regular session or save the last session respectively.

Regular Sessions Bookings for 607819 are complete

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3.4.14 Creating Block Bookings

To create Block Bookings use the 'Booking', 'Block Book' option from the main menu



Enter the booking reference number for creating the block bookings:

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Enter the Appointment date and time and the use either the Submit button to save the booking, or the 'Next' button to create more Block Bookings

OMIS

Account/Department User Booking Reports Admin

Block Book Booking

Patient Details Booking Status: Organisation:

Firstname **Surname** **Date of Birth** **Gender**

Other Reference Number Type **Other Reference Number** **Postcode** **NHSNumber**

Patient ID **Language** **GP Code** **GP Name**

Booking Details ☐ Confirmation Required **Job Status:** **Job Number:**

Appointment Date **Appointment Time** **Hrs** **Minutes** **Venue Address (If different from site address)**

County **Postcode** **Venue phone**

Preferred Interpreter Gender **Service Type** **Payment Code** **Venue fax**

No. Pats Reg Sess **Location 1** **Contact 1** **Location 2** **Contact 2**

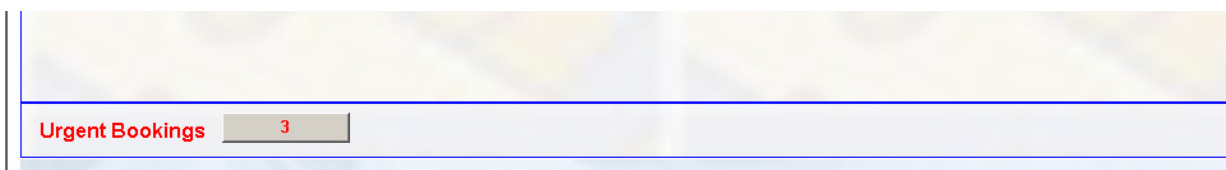
Interpreter Assigned

When the Final block Booking is complete, click on the 'Submit' button to save and return to the Home Page.

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3.4.15 Urgent Bookings

Whenever there are bookings on the system with only four hours or less left before the appointment time, an 'Urgent Bookings' message will be displayed on the footer of the screen as shown below:



Click on the button that shows the number of Urgent Bookings.

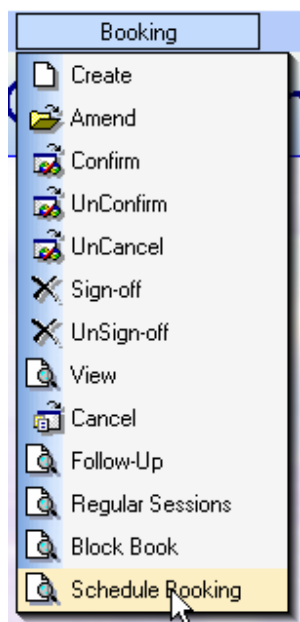
Account/Department	User	Booking	Reports	Admin																																
Select Booking for Confirm																																				
Old Job No:	<input type="text"/>	Appointment Date:	From <input type="text"/> To <input type="text"/>	<input type="checkbox"/> Display History																																
Booking Ref:	<input type="text"/>	Patient Surname:	<input type="text"/>	<input type="checkbox"/> Preserve Selection																																
Language:	<input type="text"/> <input type="button" value="Int Diary"/>	Interpreter:	<input type="text"/>	<input type="button" value="Search"/>																																
Patient ID:	<input type="text"/>	Postcode:	<input type="text"/>	<input type="button" value="Int Cancel"/>																																
<table border="1"> <thead> <tr> <th>Booking_ID</th> <th>Appointment Date</th> <th>Appointment Time</th> <th>Status</th> <th>Customer</th> <th>PostCode</th> <th>Surname</th> <th>FirstName</th> </tr> </thead> <tbody> <tr> <td>607028</td> <td>Aug 23, 2004</td> <td>09:00:00</td> <td>Unconfirmed</td> <td>SCARSDALE MEDICAL CENTRE</td> <td>W8 5SX</td> <td>FAMILY</td> <td>DINKA</td> </tr> <tr> <td>606927</td> <td>Aug 23, 2004</td> <td>10:00:00</td> <td>Unconfirmed</td> <td>ST.MARY'S HOSPITAL NHS TRUST</td> <td>W2 1NY</td> <td>SAJEDA</td> <td>RASUL</td> </tr> <tr> <td>607763</td> <td>Aug 23, 2004</td> <td>11:05:00</td> <td>Unconfirmed</td> <td>THE WINDMILL MEDICAL PRACTICE</td> <td>NW2 3PS</td> <td>WARFA</td> <td>ADAR</td> </tr> </tbody> </table>					Booking_ID	Appointment Date	Appointment Time	Status	Customer	PostCode	Surname	FirstName	607028	Aug 23, 2004	09:00:00	Unconfirmed	SCARSDALE MEDICAL CENTRE	W8 5SX	FAMILY	DINKA	606927	Aug 23, 2004	10:00:00	Unconfirmed	ST.MARY'S HOSPITAL NHS TRUST	W2 1NY	SAJEDA	RASUL	607763	Aug 23, 2004	11:05:00	Unconfirmed	THE WINDMILL MEDICAL PRACTICE	NW2 3PS	WARFA	ADAR
Booking_ID	Appointment Date	Appointment Time	Status	Customer	PostCode	Surname	FirstName																													
607028	Aug 23, 2004	09:00:00	Unconfirmed	SCARSDALE MEDICAL CENTRE	W8 5SX	FAMILY	DINKA																													
606927	Aug 23, 2004	10:00:00	Unconfirmed	ST.MARY'S HOSPITAL NHS TRUST	W2 1NY	SAJEDA	RASUL																													
607763	Aug 23, 2004	11:05:00	Unconfirmed	THE WINDMILL MEDICAL PRACTICE	NW2 3PS	WARFA	ADAR																													

The screen above displays the 'Urgent' bookings. These can be confirmed/cancelled... as necessary.

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3.5 Scheduled Bookings

Scheduled Bookings can be accessed via the main menu option as follows:



Click on the 'Schedule Booking' option to enter the Booking Screen

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Schedule Booking

Language:
Arabic

Interpreter's Preferred Gender:
All

November 2004

Mon	Tue	Wed	Thu	Fri	Sat	Sun
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	01	02	03	04	05
06	07	08	09	10	11	12

☒ Unconfirmed
☒ Confirmed
☒ Cancelled
☒ Signed Off
☒ Invoiced

	8:00 AM	8:30 AM	9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM	3:00 PM	3:30 PM	4:00 PM	4:30 PM	5:00 PM	5:30 PM	6:00 PM	6:30 PM	7:00 PM	7:30 PM
BENJELLOUN, WAFAA																								
HAFIDI, LALA HCHOUM																								
NASHED, NAGI																								
NOUR, HASSAN																								
ADUF, HODA																								
VAGHEFIAN, MAJID																								
BALAL, MAHA																								
AMIN, HEWA																								
MERGHANI, MOHAMMED																								
MEHDI, SUHA																								
MOHAMAD, SOUAD																								
SMITH, MIRNA																								
BABIKER, MOHAMMED																								
EL-SHALLALY, NAFISA																								

The above screen shows the default display for the Booking Screen. The language defaults to 'Arabic' since this is the most used language. The date defaults to today.

The screen shows all the interpreter's for the selected language and on the left and their availability on the main screen.

Online Management of Interpretive Services (OMIS)	Version: 4.1
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3.5.1 Selecting the Language

Select the Language for the booking you are interested in. On selecting the Language, the screen will re-display and show all the interpreters for the selected language, 'Bengali' in the screen below.



Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Language:
Bengali

Interpreter's Preferred Gender:
All

July 2004

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	01
02	03	04	05	06	07	08

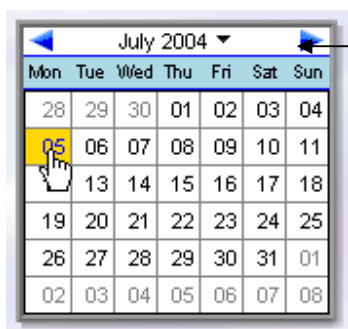
☒ Unconfirmed
☒ Confirmed
☒ Cancelled
☒ Signed Off
☒ Invoiced

	8:00 AM	8:30 AM	9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM	3:00 PM	3:30 PM	4:00 PM	4:30 PM	5:00 PM	5:30 PM	6:00 PM	6:30 PM	7:00 PM	7:30 PM
CHOUDHURY, SHAMSULALAM																								
SARKAR, MALATI			60 REQU				5869 ORTHOP						50			5933								
MALLIK, MEENA				593725							Unable to					6019								
				595004												REQUEST								
BIBI, MARY																								
KHALIQUE, ROUNAQUE							60 female						6017											
CHOUDHURY, MAHMUDUR R.																								
ALI, NADIRA							60 FEMA																	
CHOUDHURY, MOHAMMED			60 BLIN																					

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

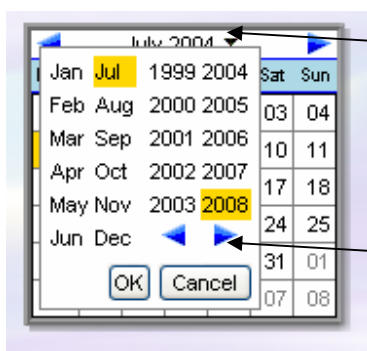
3.5.2 Selecting the Date

Use the Calendar to select the date that you need for the Booking:



Use the Blue icons to navigate to the Next/Previous month.

Use the Next/Previous Month picker to view dates for different months of the year. Click on the Day that you want to start viewing the Calendar. In the example above the diary will start on the 5th July 2004.



Popup Month/Year picker

Month/Year Picker

Use the Popup Month/Year selector to navigate to the required Year and Month. After selecting the Month/Year click on the 'OK' or 'Cancel' button.

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3.5.3 Selecting the Interpreter's Preferred Gender

This option allows you to selectively view the Male, Female or both gender interpreters.

3.5.3.1 All Interpreters

By default the first view that is displayed for All gender interpreters.

Language:

Interpreter's Preferred Gender:

July 2004
Mon Tue Wed Thu Fri Sat Sun
28 29 30 01 02 03 04
05 06 07 08 09 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 31 01
02 03 04 05 06 07 08

☒ Unconfirmed
☒ Confirmed
☒ Cancelled
☒ Signed Off
☒ Invoiced

	8:00 AM	8:30 AM	9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM	3:00 PM	3:30 PM	4:00 PM	4:30 PM	5:00 PM	5:30 PM	6:00 PM	6:30 PM	7:00 PM	7:30 PM
CHOUDHURY, SHAMSULALAM																								
SARKAR, MALATI			61 REQU				5869 ORTHOP						51			5933								
MALLIK, MEENA				593725					Unable to						6019									
BIBI, MARY																								
KHALIQUE, ROUNAQUE							61 female						6017											
CHOUDHURY, MAHMUDUR R.																								
ALI, NADIRA							61 FEMA																	
CHOUDHURY, MOHAMMED			61 BLIN																					

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.5.3.2 Male Interpreters

The Male selection allows you to view the Diary for the 'Male' interpreters only.

Interpreter's Preferred Gender:

Male

All

Female

Male

Unknown

Select the 'Male' option as shown above to amend the diary

Schedule Booking

Language: Bengali

Interpreter's Preferred Gender: Male

July 2004

	8:00 AM	9:30 AM	9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM	3:00 PM	3:30 PM	4:00 PM	4:30 PM	5:00 PM	5:30 PM	6:00 PM	6:30 PM	7:00 PM	7:30 PM
CHOUDHURY, SHAMSULALAM																								
CHOUDHURY, MAHMUDUR R.																								
CHOUDHURY, MOHAMMED																								

Legend:

- ☒ Unconfirmed
- ☒ Confirmed
- ☒ Cancelled
- ☒ Signed Off
- ☒ Invoiced

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.5.3.3 Female Interpreters

The Female view allows you to view the Diary for the 'Female' Interpreters only.

Interpreter's Preferred Gender:

Male

All

Female

Male

Unknown

Select the 'Female' option as shown above to amend the diary to.

Schedule Booking

Language: Bengali

Interpreter's Preferred Gender: Female

July 2004

Mon Tue Wed Thu Fri Sat Sun

28 29 30 01 02 03 04

05 06 07 08 09 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 30 31 01

02 03 04 05 06 07 08

☒ Unconfirmed

☒ Confirmed

☒ Cancelled

☒ Signed Off

☒ Invoiced

	8:00 AM	8:30 AM	9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM	3:00 PM	3:30 PM	4:00 PM	4:30 PM	5:00 PM	5:30 PM	6:00 PM	6:30 PM	7:00 PM	7:30 PM
SARKAR, MALATI			61 REQUEST INT (33-MALA				5869 ORTHOP. FRACTURE CLINIC, GROUND						51			5933								
MALLIK, MEENA					593725											6019 REQUEST FOR INT (34-MEENA								
BIBI, MARY																								
KHALIQUE, ROUNAQUE							61 female int require winstor						6017											

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3.5.4 Viewing Bookings by Status

You can view bookings for the Interpreter by selecting/unselecting the status of the bookings that you need to view:



By default all the Bookings status' are selected. Unselect any booking status that you do not wish to view. This will trigger a refresh and the bookings for the status that was unselected will not be displayed. In the above example all 'Cancelled' bookings have been unselected and are not displayed on the diary after the refresh.

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Schedule Booking

Language: Bengali

Interpreter's Preferred Gender: Female

July 2004

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	01
02	03	04	05	06	07	08

☒ Unconfirmed

☒ Confirmed

☒ Cancelled

☒ Signed Off

☒ Invoiced

	8:00 AM	8:30 AM	9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM	3:00 PM	3:30 PM	4:00 PM	4:30 PM	5:00 PM	5:30 PM	6:00 PM	6:30 PM	7:00 PM	7:30 PM
SARKAR, MALATI			60 REQU INT (33- MALA				5869 ORTHOP FRACTUR CLINIC, GROUND						50 INT			5933 INT								
MALLIK, MEENA					595004 INT											6019 REQUEST FOR INT (34- MEENA								
BIBI, MARY																								
KHALIQUE, ROUNAQUE						60 female int require winstor							6017 INT											

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3.5.5 Booking Status Colours

The colour scheme that is used for the status of the bookings is as follows:

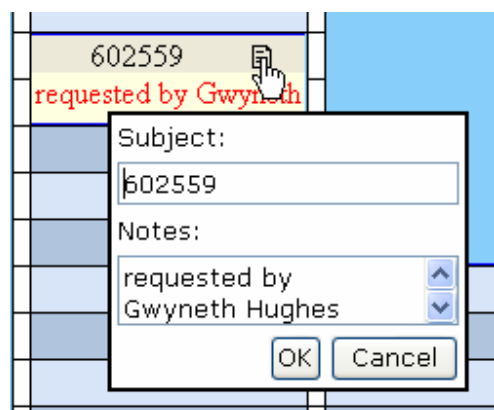
Booking Status	Colour
Confirmed	Yellow
Cancelled	Red
Signed-off	Green
Invoiced	Blue

3.5.6 View Booking Notes

You can view the booking notes by using two methods:

- (1) Click on the notes icon shown within the booking
- (2) Click twice on the booking notes (which may not all be visible). Once to select the booking and the second time to view the notes

Use the OK or Cancel button to close the notes. Bookings cannot be created or edited via the Interpreter's Diary. You can view the details only.



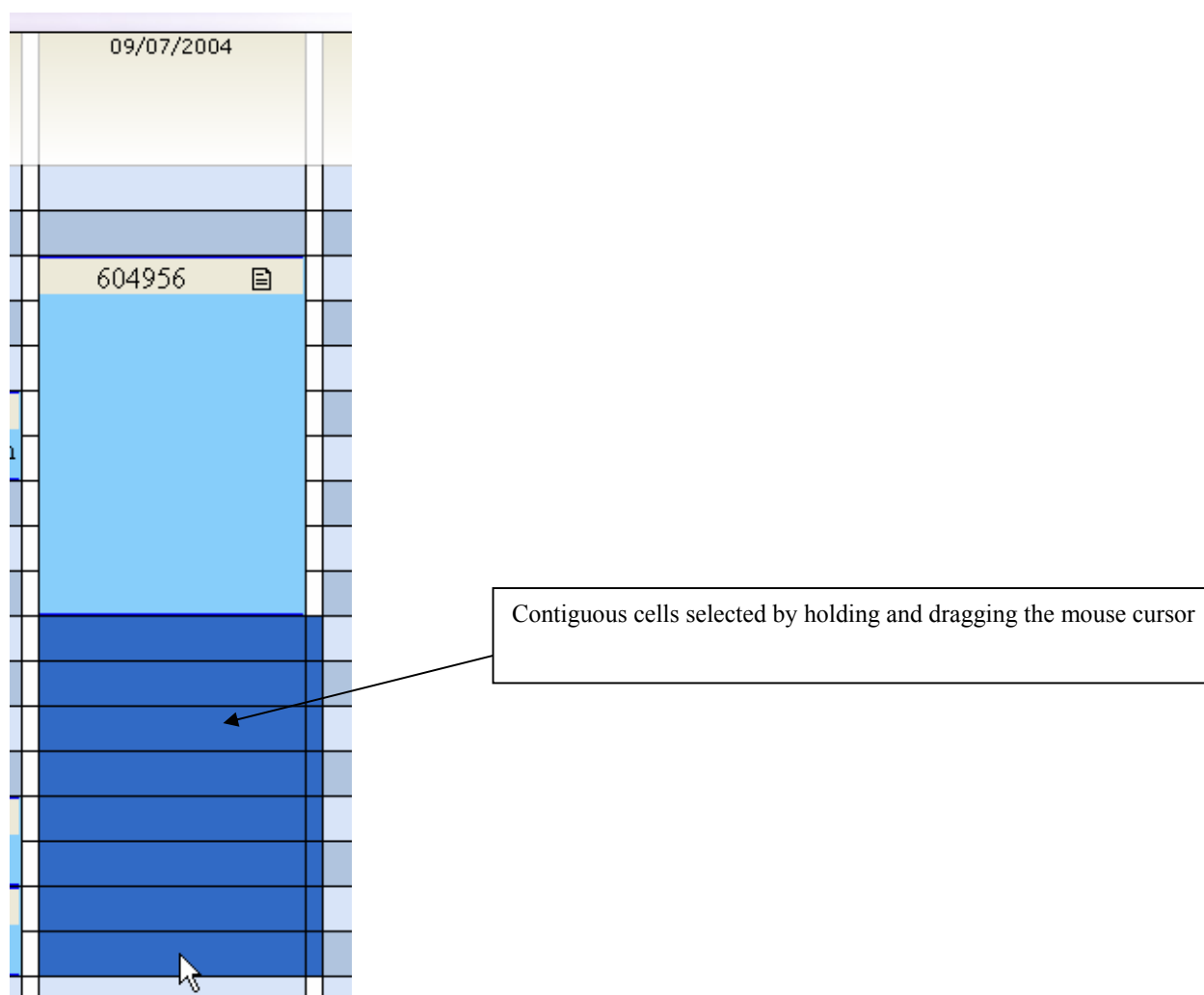
Online Management of Interpretive Services (OMIS)	Version: 4.1
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3.5.7 Create a Booking

This function allows you to create a Booking for the criteria you have selected.

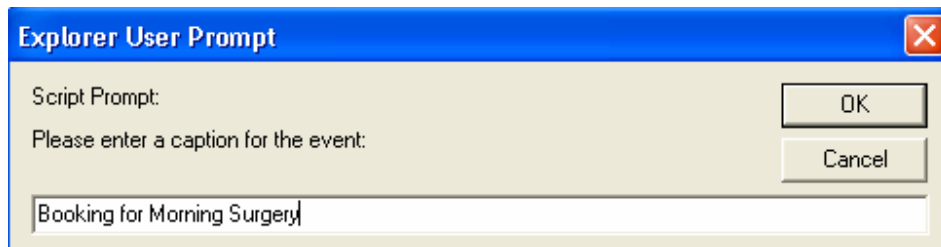
You can create the booking in two ways:

- (1) Click on a day cell
- (2) Select a contiguous range of day cells



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This will display the following prompt so that you can enter the notes relating to the unavailability



Explorer User Prompt

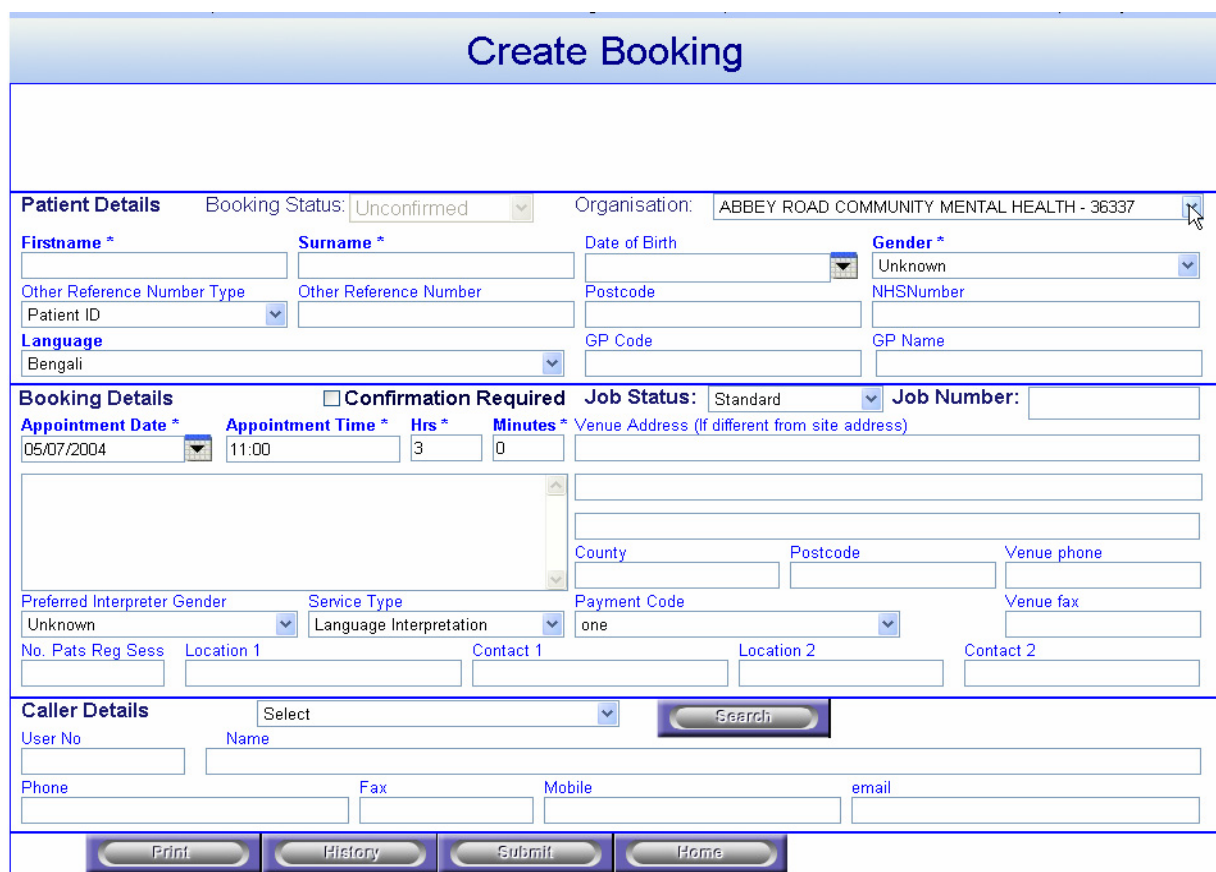
Script Prompt:
Please enter a caption for the event:

Booking for Morning Surgery

OK Cancel

Enter the text and click on the 'OK' button

3.5.8 Create Booking Details



Create Booking

Patient Details Booking Status: Unconfirmed Organisation: ABBEY ROAD COMMUNITY MENTAL HEALTH - 36337

Firstname * Surname * Date of Birth Gender *
 Other Reference Number Type Other Reference Number Postcode NHSNumber
 Patient ID Language GP Code GP Name
 Bengali

Booking Details ☐ Confirmation Required Job Status: Standard Job Number:
 Appointment Date * Appointment Time * Hrs * Minutes * Venue Address (If different from site address)
 05/07/2004 11:00 3 0
 County Postcode Venue phone
 Preferred Interpreter Gender Service Type Payment Code Venue fax
 Unknown Language Interpretation one
 No. Pats Reg Sess Location 1 Contact 1 Location 2 Contact 2

Caller Details Select Search
 User No Name
 Phone Fax Mobile email
 Print History Submit Home

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The above screen will be displayed for the selected language Interpreter, Language and Time:

(1) Select the Organisation for the Booking

- (2) Enter the First name and Surname of the patient
- (3) Amend the Notes and enter other details of the patient
- (4) Click on the 'Submit' button to save the booking

Create Booking for 607830 is complete

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3.6 Reports

This section describes the Reports that are available to OMIS Administrators.

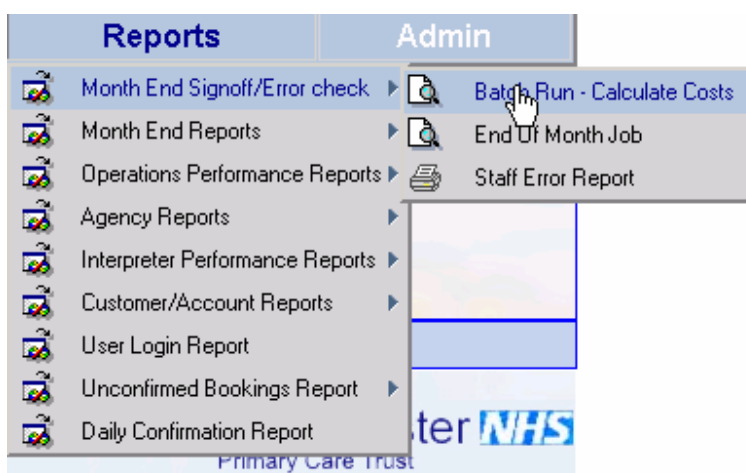
3.6.1 Month End/ Error Check

Batch Jobs are run at the end of each month. Some jobs can be run throughout the month so that any data entry errors in sign-off can be detected. The Month End Error check report is one of these

3.6.1.1 Batch Run

The Batch run job will process any jobs that have been signed-off since the last time this job was run and calculate the Costs for all these bookings.

To start the job Select the option from the Menu

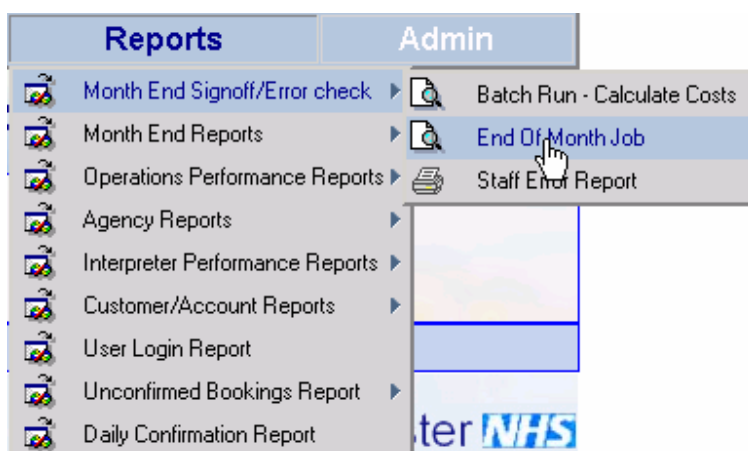


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When the job is selected, the title displays the current job number. Click on the 'Submit' button and press the 'OK' button to start the job. A Progress bar will appear at the bottom (part of the Internet Explorer). When this is complete, the jobs will have finished and all jobs that have been signed off this month will have been calculated.

You can now print the Staff Error Report to look for errors in the signed-off bookings.

3.6.1.2 End of Month Job



The End of Month Job is used to close all signed-off bookings entered since the last batch and convert them all to 'Invoiced'. The next batch job number is then created and this is set to the 'Current' batch number.

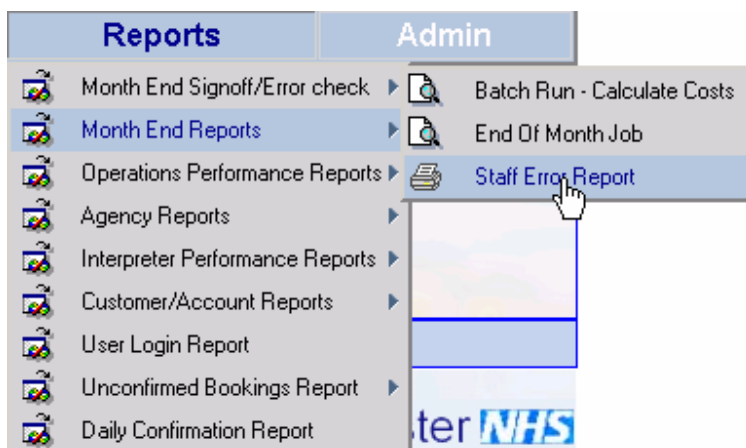
This job is password protected and should only be run by the OMIS administrator at the end of the month when all the job forms that have been received are signed-off

Enter the password and then Click on the 'submit' button and press the 'OK' key to complete the job.

Account/Department	User	Booking	Reports	Admin
Create New Batch 143				
Password: <input type="password"/>				
<input type="button" value="Submit"/> <input type="button" value="Home"/>				

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3.6.1.3 Staff Error Report



The staff Error Report is used to identify any errors that may exist during the Sign-off process, especially where large payments are made due to an incorrect entry of the appointment time.

To create the Report, Select the Batch number that you require the report for and any notes that you may want to enter, then click on the 'Submit' button:

The screenshot shows the Staff Error Report form. It has a header with tabs: 'Account/Department', 'User', 'Booking', 'Reports', and 'Admin'. The 'Reports' tab is active. Below the header, there is a 'Batch ID:' dropdown menu with a list of numbers from 134 to 142. To the right of the dropdown is a 'Notes:' text area. At the bottom of the form, there are two buttons: 'Submit' and 'Home'.

A sample of the report is shown below

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

1 of 1+ 100% powered by crystal

Batch_ID

141

Staff Monthly Spot Check Report

ABDELAZIM, FATIMA

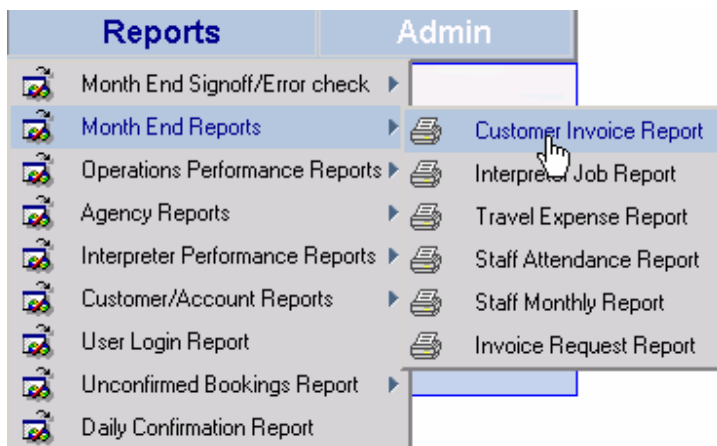
Job_No	Appointment	App Start/End	Patient	Patient	Time Charged	Interpreter Fee	Service Type	Outcome
0 600577	28 Jun 2004	09:30:00 18:00:00	GP	CONSULTATIONS	8.50	£94.20	Language Interpretation	Standard
0 600578	29 Jun 2004	09:00:00 18:00:00	GP	CONSULTATIONS	9.00	£99.46	Language Interpretation	Standard
0 600579	30 Jun 2004	09:00:00 18:00:00	GP	CONSULTATIONS	9.00	£99.46	Language Interpretation	Standard
0 605281	02 Jul 2004	09:30:00 18:00:00	GP	CONSULTATION	8.50	£94.20	Language Interpretation	Standard
0 605358	05 Jul 2004	09:30:00 14:00:00	GP	CONSULTATION	8.00	£88.93	Language Interpretation	Standard

Any Sign-offs where the appointment is more than three hours is displayed in this report.

3.6.2 Month End Reports

3.6.2.1 Customer Invoice Report

The Customer Invoice Report is available after the 'End Of month' job has been run. This provides all the invoices that are sent to the Account Holders.



Online Management of Interpretive Services (OMIS)	Version: 4.1
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Select the Batch ID that you require for the report and enter any notes that need to be added at the end of each section for each Customer. The same notes will be added for each Customer.

Account/Department	User	Booking	Reports	Admin
Batch ID: 134 Notes: <input type="text"/>				
<div> <div> 134 135 136 137 138 139 140 141 142 </div> <div> <p>ARY CARL</p> <p>NORTH W</p> </div> </div>				
<div>Submit Home</div>				
<div> <div>1 of 145</div> <div>100%</div> <div>powered by crystal</div> </div>				

An example of the report is shown below. The report is printed in Landscape:



Printed on 22-Aug-2004 at 5:28 pm

Page 1 of 2

Customer Invoice Report

Batch Reference : 141

BRENT PRIMARY CARE TRUST

CHALKHILL HEALTH CENTRE

ROOK CLOSE, OFF CHALK HILL ROAD

WEMBLEY

WEMBLEY

Account No.: 10

HA9 9BQ

GRIP

GENERAL PRACTICE

Westminster PCT NHS

St Charles Hospital

Courtfield House, Exmoor Street

London W10 6DZ

Old No	New No	Appt. Date	Start/End	Time charged	Language	Pat. Name	Hosp./NHS	Username	Amount	Agency	Booking
ALPERTON MEDICAL CENTRE											
0	602987	30-Jun-2004	09:30:00	11:30:00	180	SOMALI	GP SESSION	S.CAVILL	£79.92		Regular Sessions
0	605839	07-Jul-2004	09:30:00	11:30:00	120	SOMALI	GP SESSION	SONIA CAML	£62.40		Regular Sessions
0	605840	14-Jul-2004	09:30:00	11:30:00	120	SOMALI	GP SESSION	S.SAMUI	£62.40		Regular Sessions
0	605961	21-Jul-2004	09:30:00	11:30:00	120	SOMALI	GP SESSION	S.CAVILL	£62.40		Regular Sessions
0	605962	28-Jul-2004	09:30:00	11:30:00	120	SOMALI	GP SESSION	SAMUI	£62.40		Regular Sessions
BABY CLINIC											
0	596628	13-May-2004	16:30:00	17:00:00	60	PORTUGUESE	SANDRAMACHAO	JEAN BELLOT	£44.88	PN	Standard
0	601512	29-Jun-2004	09:30:00	11:00:00	90	SOMALI	HAINA EGAL	CHARLIE ROE	£53.64		Standard

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3.6.2.2 Interpreter Job Report

The interpreter Job report lists all future appointments booked for interpreters. This is posted to all interpreters at the end of the month after the batch Job has run. The Report can be run at any time of the month since it does not require a Batch ID. The Start date is required for this report:

You can either select 'All' for all Interpreters to select an individual interpreter by name.

Account/Department	User	Booking	Reports	Admin
<div> <div> Interpreter: All </div> <div> Start Date: 22/08/2004 </div> </div> <div> Notes: </div> <div> Submit Home </div>				

A sample of the report is shown below:

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Printed on 22-Aug-2004 at 5:33 pm

Page 1 of 1

Interpreter Job Number Reference Report

ABDEL RAHMAN, ISMAT

AFRICA HOUSE, FLAT 1
2 BLOMFIELD VILLAS

LONDON

W2 6NH



Westminster PCT NHS

St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ

Status

Staff No: 883

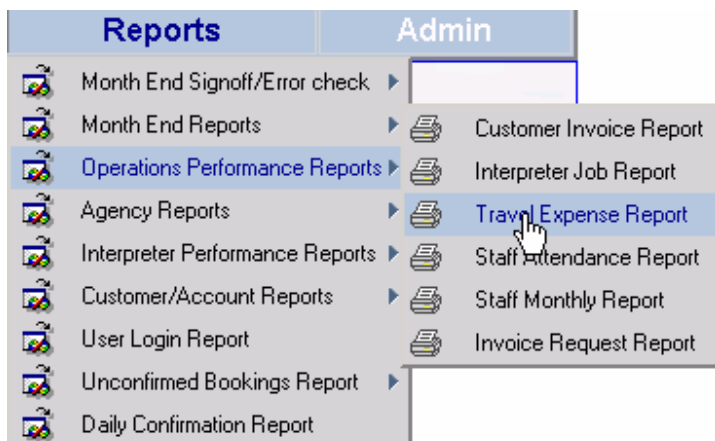
New No	Old no	App Date	App Time	Patient Firstname	Patient Lastname	Status
601277	0	08 Sep 2004	15:00:00	FARAH	IBRAHEEM	Standard
606686	0	20 Sep 2004	15:30:00	SAMI	FARAG	Standard
606710	0	21 Sep 2004	15:00:00	MOHAMMED YOUNIS	RIDA	Standard
601486	0	24 Sep 2004	15:30:00	MOHAMMED	TAKI	Follow-Up
599241	0	28 Sep 2004	11:00:00	ABOUKADER	ADWAR	Follow-Up
601488	0	29 Sep 2004	13:30:00	MOHAMMED	TAKI	Follow-Up
601489	0	29 Sep 2004	14:00:00	MOHAMMED	TAKI	Follow-Up
604353	0	29 Sep 2004	14:00:00	SAMIRA	ABDELRAHMAN	Follow-Up
594548	0	05 Oct 2004	15:00:00	KITANA	MURADI	Standard
606643	0	08 Oct 2004	11:00:00	SAID	BERGAM	Standard
606523	0	12 Oct 2004	14:00:00	ISMAIL	IBRAHIM	Standard
604175	0	13 Oct 2004	15:05:00	BUSHRA	HASSANI	Follow-Up
602258	0	20 Oct 2004	12:10:00	JALLAL	ABDALLAH	Follow-Up
606245	0	25 Oct 2004	14:45:00	MERWAY	AZIZ	Follow-Up
603320	0	01 Nov 2004	10:40:00	ABDELKABER	BENZAINA	Standard
606715	0	08 Nov 2004	10:30:00	HISHAM	FARIS	Standard
604170	0	16 Nov 2004	13:00:00	CONFIDENTIAL	CONFIDENTIAL	Follow-Up
594511	0	31 Dec 2004	14:10:00	MUHEN	GHERYANI	Follow-Up
604172	0	12 Jan 2005	11:00:00	SAMIRA	ABDELRAHMAN	Follow-Up
595171	0	13 Jan 2005	12:30:00	CONFIDENTIAL	CONFIDENTIAL	Follow-Up
597470	0	07 Feb 2005	14:30:00	ISLAM(BABY)	SAMEN	Follow-Up

Notes:

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.2.3 Travel Expense Report

The travel expense report gives a list of payments for the interpreter and the amount for each day of the month.



Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Printed on 23-Aug-2004

at 8:50 am

Page 1 of 2

Travel Expense

ABDELAZIM, FATIMA

129 BROADLEY STREET
FLAT 2

LONDON
NW8 8BA

Staff No: 1131



Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ

Personnel number: 203725

Batch Ref.: 141

Appointment Date	Travel Amount	No. of Jobs
25-Jun-2004	£4.00	1
28-Jun-2004	£4.00	1
02-Jul-2004	£4.00	1
05-Jul-2004	£4.00	2
06-Jul-2004	£4.00	1
07-Jul-2004	£4.00	1
08-Jul-2004	£4.00	1
09-Jul-2004	£4.00	1
12-Jul-2004	£4.00	2
13-Jul-2004	£4.00	1
14-Jul-2004	£4.00	1
15-Jul-2004	£4.00	1
16-Jul-2004	£4.00	1
19-Jul-2004	£4.00	1
20-Jul-2004	£4.00	1

3.6.2.4 Staff Attendance Report

This report provides the Staff Attendance Report that is sent to Payroll for payment.

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Account/Department	User	Booking	Reports	Admin
<div> <div>Batch ID:</div> <div>141</div> </div> <div> <div>Month Text:</div> <div>July 2004</div> </div> <div> <div>Notes:</div> <div></div> </div>				
<div>Submit</div> <div>Home</div>				

Select the Batch ID and enter the Month Text you want to display in the Report. Also enter any notes which will appear in each attendance Record.



Westminster PCT - NHS
GRIP Services
 St Charles Hospital
 Courtfield House, Exmoor Street
 London W10 6DZ

Staff Monthly Attendance Record

Batch Reference: 141

ABDEL RAHMAN, ISMAT		Month: July 2004	
Payroll	Dept.	Personal No. 203023	
Pay Amount: £492.28		Total Time: 2030 Mins	
Remarks:		Certified - Head of Department/Sup	
		Date:	
		Payroll Office	
		Date:	

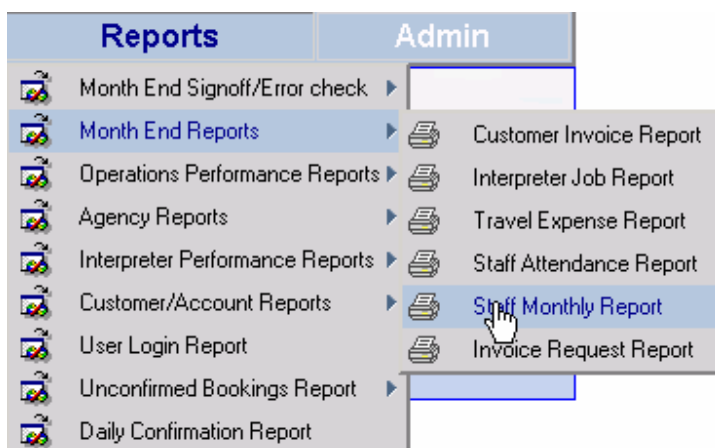
Notes:

An example report is shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.2.5 Staff Monthly Pay Report

The Staff monthly Report gives details of all the payments to be made to Interpreters for the Batch:



The Report below shows a sample of the Report from Batch 141

The screenshot shows a web application form for generating a report. It includes a 'Batch ID' dropdown menu with a list of batch numbers (134, 135, 136, 137, 138, 139, 140, 141, 142). The 'Notes' field is a large text area. At the bottom, there are 'Submit' and 'Home' buttons.

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Printed on 22-Aug-2004 at 6:06 pm

Page 1 of 1

Staff Monthly Report

ABDEL RAHMAN, ISMAT

AFRICA HOUSE, FLAT 1
2 BLOMFIELD VILLAS

LONDON

W2 6NH

Staff No: 883

Batch Ref.: 141

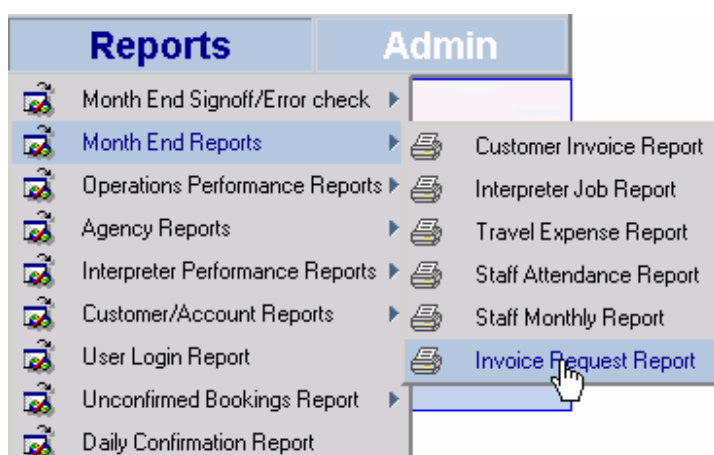


Westminster PCT NHS

St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ

New No	Old No	Appointment Date	Time	Department	Language	Start	End Time	Mins	Booking Status	Interpreter Fee
601780	0	29 Jun 2004	10:00:00	626	Arabic	10:00:00	11:05:00	65		£16.10
598069	0	29 Jun 2004	11:45:00	646	Arabic	11:55:00	13:45:00	110		£24.00
601308	0	29 Jun 2004	15:10:00	662	Arabic	15:10:00	17:45:00	155		£31.89
601656	0	01 Jul 2004	10:00:00	279	Arabic	10:00:00	11:00:00	60		£15.22
599934	0	05 Jul 2004	10:00:00	790	Arabic	10:00:00	11:00:00	60		£15.22
601297	0	05 Jul 2004	13:45:00	231	Arabic	13:45:00	14:45:00	60		£15.22
601950	0	05 Jul 2004	15:30:00	563	Arabic	15:30:00	16:30:00	60		£15.22
601235	0	06 Jul 2004	10:00:00	659	Arabic	10:00:00	11:00:00	60		£15.22
600721	0	06 Jul 2004	13:30:00	793	Arabic	13:25:00	14:00:00	60		£15.22
595170	0	06 Jul 2004	15:00:00	758	Arabic	15:00:00	16:00:00	60		£15.22
596432	0	07 Jul 2004	11:00:00	630	Arabic	11:00:00	12:00:00	60		£15.22
602477	0	07 Jul 2004	16:00:00	815	Arabic	16:00:00	17:30:00	90		£20.49
602783	0	08 Jul 2004	09:00:00	313	Arabic	09:00:00	10:20:00	80		£18.73
603774	0	08 Jul 2004	11:00:00	279	Arabic	11:00:00	11:30:00	60		£15.22
603508	0	08 Jul 2004	13:00:00	233	Arabic	13:00:00	14:00:00	60		£15.22
602865	0	08 Jul 2004	15:00:00	563	Arabic	15:00:00	15:30:00	60		£15.22
600718	0	09 Jul 2004	10:00:00	722	Arabic	10:00:00	10:15:00	60		£15.22
600268	0	09 Jul 2004	12:20:00	828	Arabic	12:00:00	12:30:00	60		£15.22
602321	0	09 Jul 2004	15:30:00	273	Arabic	15:30:00	16:30:00	60		£15.22
600817	0	12 Jul 2004	15:00:00	763	Arabic	15:00:00	15:25:00	60		£15.22
604171	0	13 Jul 2004	14:00:00	630	Arabic	14:00:00	15:00:00	60		£15.22
601609	0	13 Jul 2004	17:00:00	1238	Arabic	17:00:00	17:50:00	60		£15.22
600685	0	14 Jul 2004	10:00:00	630	Arabic	10:00:00	12:00:00	120		£25.75
603183	0	14 Jul 2004	13:00:00	254	Arabic	13:00:00	14:30:00	90		£20.49
600617	0	16 Jul 2004	09:45:00	746	Arabic	09:45:00	10:30:00	60		£15.22
600259	0	16 Jul 2004	12:00:00	626	Arabic	12:00:00	13:00:00	60		£15.22

3.6.2.6 Invoice Request Report



Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Invoice Request Report

Batch Reference:

134

To: Finance Department Westminster PCT NHS

From: GRIP Language Services - Westminster PCT NHS



Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ

Please raise an invoice for Interpreting services provided to:

ROD GOODYER
BRENT PRIMARY CARE TRUST
CHALKHILL HEALTH CENTRE
ROOK CLOSE, OFF CHALK HILL ROAD
WEMBLEY
WEMBLEY HA9 9BQ

Main Parent: Y Customer Account: 10

Total Amount Due: **£18,078.73** | Total Time: **483.20** Hrs.

Period Covered: _____

Cost Centre Code: _____

Account Code: _____

Manager's Signature: _____ Date: _____

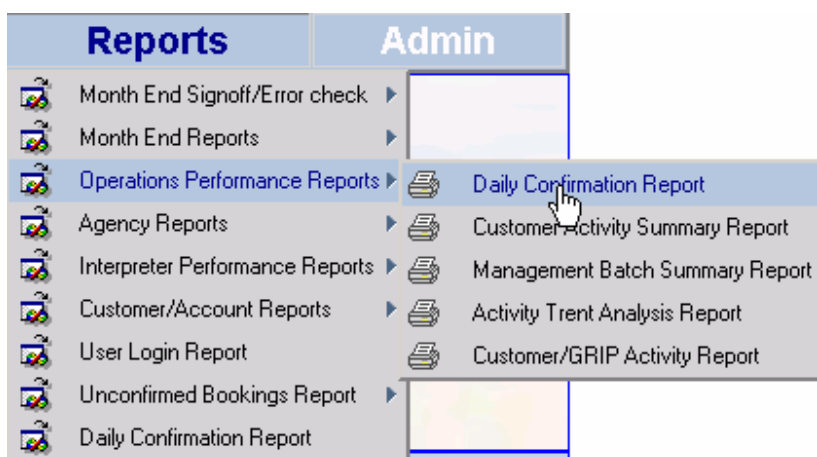
Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.3 Operations Performance Reports

These reports are for the use of OMIS Administrators for performance monitoring:

3.6.3.1 Daily Confirmation

Select the report from the main menu as shown below



Account/Department	User	Booking	Reports	Admin
Start Date: 16/08/2004	End Date: 16/08/2004	Notes: <div></div>		
<input type="button" value="Submit"/>		<input type="button" value="Home"/>		

Enter the Start and End dates for the period of the report, enter any notes and press the 'Submit' button

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Printed on 22-Aug-2004 at 6:26 pm

Page 1 of 3

Daily Confirmation Report



Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ

16-August-2004

Follow-Up

JOSEPHINE OKAFOR	1	0.85%
NAFISA MIRZA	14	11.86%
	15	100%

Regular Sessions

HURAI ROGERS	11	9.32%
	11	100%

Standard

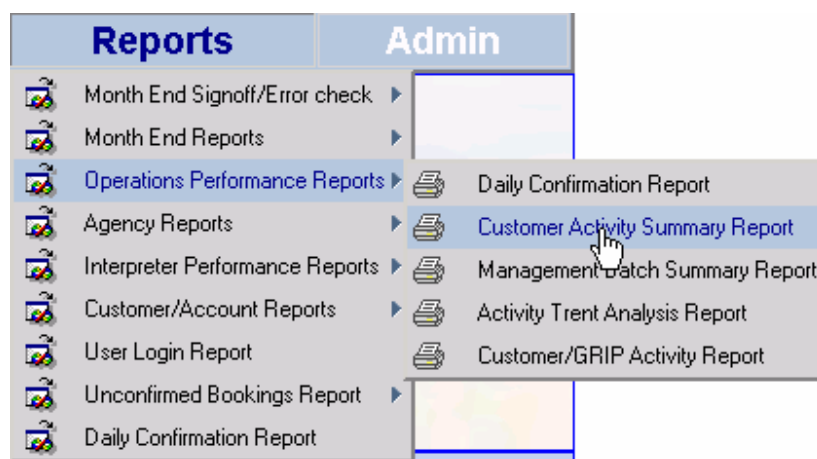
CHINEDU MKPULUMA	3	2.54%
GEORGE COLEMAN	47	39.83%
JOSEPHINE OKAFOR	41	34.75%
KOKILA SARDESAI	1	0.85%
	92	100%

An example Daily confirmation Report is shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.3.2 Customer Activity Summary Report

This Report provides a summary of Customer activity for each batch



Account/Department	User	Booking	Reports	Admin
Batch ID: <input type="text" value="141"/>	Notes: <div style="border: 1px solid black; height: 40px;"></div>			
<input type="button" value="Submit"/> <input type="button" value="Home"/>				

Select the batch number and enter any notes required for the Report

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Customer Activity Summary

Batch Reference:

134



Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ

BRENT PRIMARY CARE TRUST

CHALKHILL HEALTH CENTRE
ROOK CLOSE, OFF CHALK HILL ROAD
WEMBLEY
WEMBLEY HA9 9BQ

BRENT PRIMARY CARE TRUST

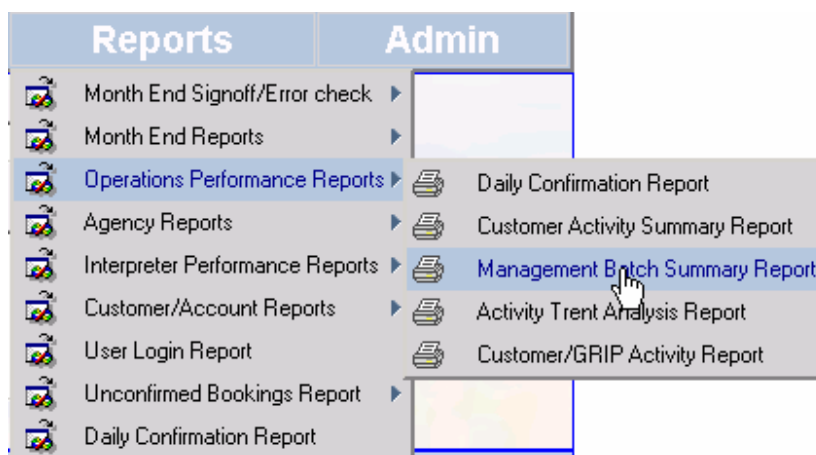
Main Parent: Y Customer: 10

ALBANIAN	16
AMHARIC	4
ARABIC	39
BENGALI	7
BULGARIAN	1
CANTONESE	10
DARI	2
FARSI	27
FRENCH	4
GREEK	2
GUJARATI	53
HINDI	7
ITALIAN	2
JAPANESE	1
KURDISH	2
MANDARIN	5
MOROCCAN	1
PASHTO	1
POLISH	7
PORTUGUESE	31
PUNJABI	5
RUSSIAN	15

An example of the Report is shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.4 Management Batch Summary Report



Account/Department	User	Booking	Reports	Admin
Batch ID: <input type="text" value="141"/>	Notes: <div style="border: 1px solid black; height: 50px;"></div>			
<input type="button" value="Submit"/> <input type="button" value="Home"/>				

Select the batch number and enter any notes required for the Report:

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Management Batch Summary Report

Batch Reference:

141



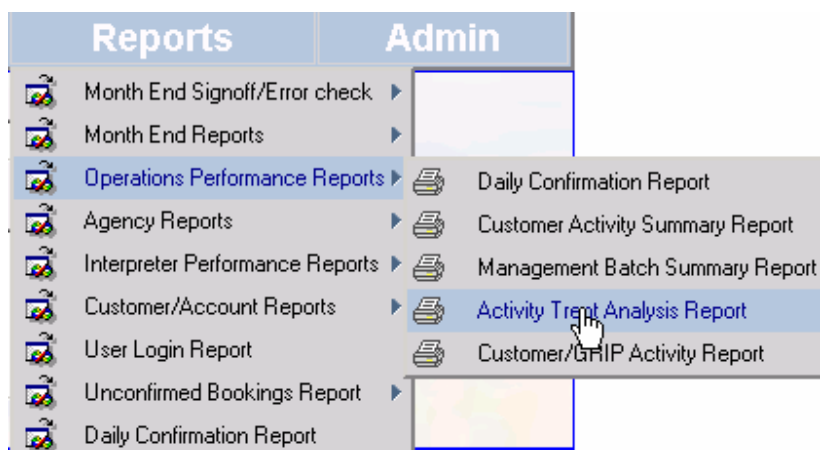
Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ

Customer By Parent	Parent Code	Total Hours	Total Amount Due
BRENT PRIMARY CARE TRUST	10	521.63	£20,545.63
CARERS NETWORK WESTMINSTER	1374	1.75	£58.02
CENTRAL & NORTH WEST LONDON MENTAL HEALTH NHS TRUST	30	298.02	£12,459.69
CHELSEA & WESTMINSTER HOSPITAL NHS TRUST	24	444.37	£17,844.02
CYGNET - BECKTON	1317	1.00	£44.88
EALING HOSPITAL CUSTOMER CARE	48	1.17	£54.88
GRIP LANGUAGE SERVICES	1348	54.17	£2,472.96
HARROW PRIMARY CARE TRUST	1460	7.92	£362.92

An example of the report is shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.5 Activity Trend Analysis Report



Account/Department	User	Booking	Reports	Admin
Start Date: <input type="text" value="01/05/2004"/>		End Date: <input type="text" value="31/05/2004"/>		Notes: <input type="text"/>
<div> <input type="button" value="Submit"/> <input type="button" value="Home"/> </div>				

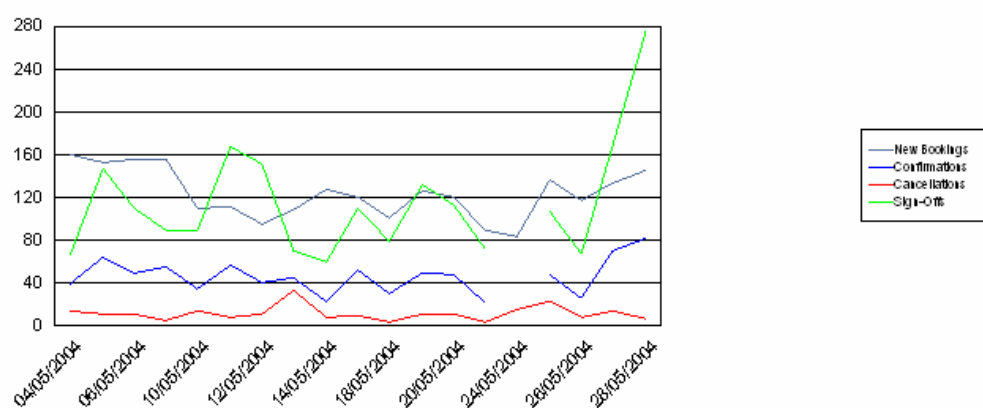
Enter the start and end dates to identify a period for the report:

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Activity Trend Analysis Report



Westminster PCT NHS
 St Charles Hospital
 Courtfield House, Exmoor Street
 London W10 6DZ

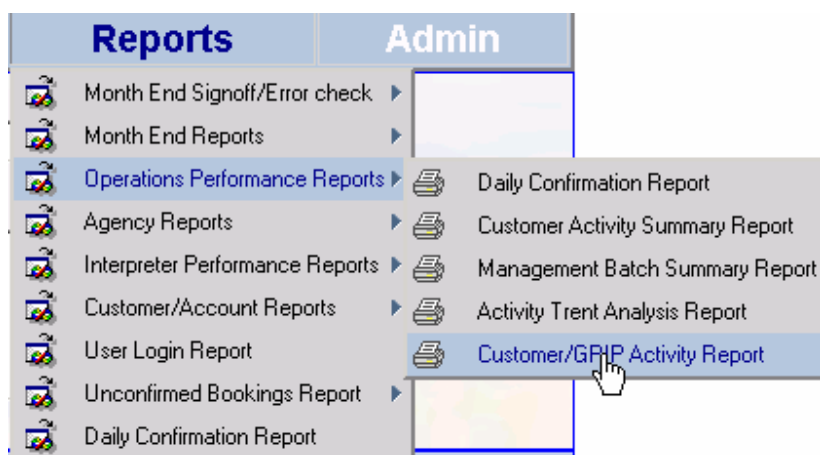


Notes:

An example of the Report is shown above

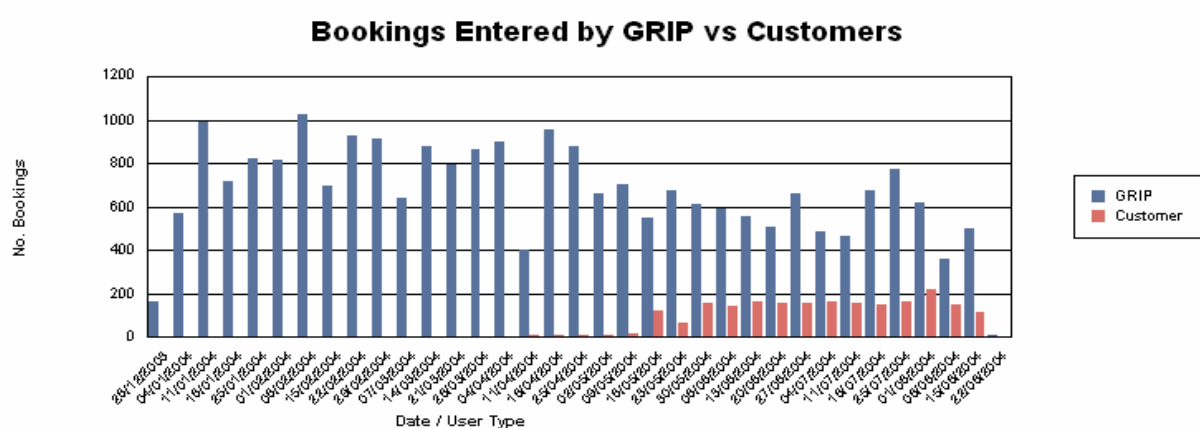
Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.6 Customer/OMIS User Activity



Account/Department	User	Booking	Reports	Admin
Start Date: 01/01/2004	End Date: 23/08/2004	Notes: <div></div>		
Submit		Home		

Enter the start and end dates for the period of the Report. Enter any notes for the Report

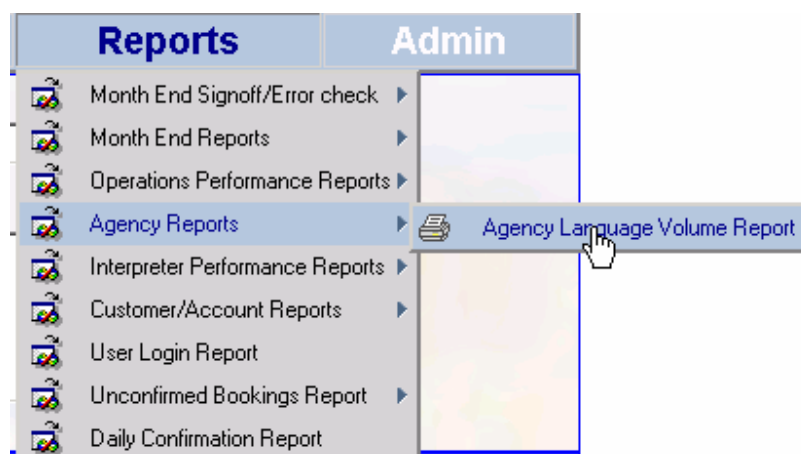


Example of Report shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.7 Agency Volume Report

This report compares the volume of appointments between and Interpreters and Agency staff



Account/Department	User	Booking	Reports	Admin
Start Date: 01/07/2004	End Date: 31/07/2004	Notes: <div></div>		
Submit		Home		

Enter the Start and End dates for the period of the report. Enter any notes required for the report:

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Agency Bookings By Language



Westminster PCT NHS
 St Charles Hospital
 Courtfield House, Exmoor Street
 London W10 6DZ

Bookings **1-Jul-2004** **to** **31-Jul-2004**

Albanian

ANITA SKENDERI	27
ARTA ISLAMI	3
MILAIM NELA	39
PRESTIGE NETWORK	13
VILDANA ZHUBI	44

Albanian	Total: Bookings	126	Agency = 13	10%	Non Agency = 113	90%
-----------------	------------------------	------------	--------------------	------------	-------------------------	------------

Amharic

HABTEGIORGIS ABRAHA	10
PRESTIGE NETWORK	5
SEMIRA RESSOM	21

Amharic	Total: Bookings	36	Agency = 5	14%	Non Agency = 31	86%
----------------	------------------------	-----------	-------------------	------------	------------------------	------------


Sample report is shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.8 Interpreter DNA Report

This report shows the Interpreter's DNA and punctuality details over a specified period.

Account/Department	User	Booking	Reports	Admin
Start Date: 01/01/2004	End Date: 31/07/2004	Notes: <div></div>		
<div>Submit</div> <div>Home</div>				

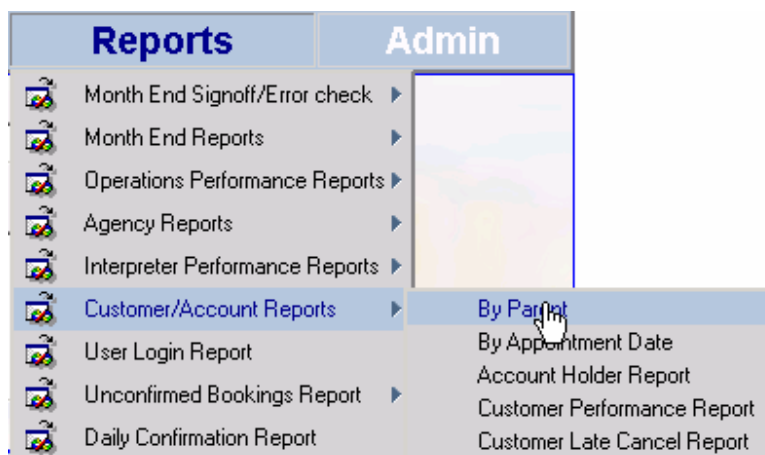
Interpreter DNA Report						
<div> <div></div> <div>Staff No: <div></div></div> </div>				Westminster PCT NHS St Charles Hospital Courtfield House, Exmoor Street London W10 6DZ		
Period	DNAs	Total Bookings	Total Hours	Punctuality	No Bookings	
03/2004	0	23	28	On Time/Early	23	
04/2004	0	41	48	0 - 10 Mins Late	1	
				On Time/Early	40	
05/2004	0	27	29	10+ Mins Late	1	
				On Time/Early	26	
06/2004	0	39	51	0 - 10 Mins Late	1	
				On Time/Early	38	
07/2004	0	37	41	0 - 10 Mins Late	1	
				On Time/Early	36	

Example report is shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.9 Customer Account Reports

3.6.9.1 By Parent



This report lists all the bookings entered on a particular day by a Customer. The list is by Account Holder and shows all the department's bookings for the account holder.

Account/Department	User	Booking	Reports	Admin
Parent Customer: ST.MARY'S HOSPITAL NHS TRUST			Notes: <div></div>	
Start Date: 20/08/2004	End Date: 20/08/2004			
<input type="button" value="Submit"/>		<input type="button" value="Home"/>		

Enter the start and end date for the report and select the Account Holder. Add any notes required for the Report

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Printed Date: August 23, 2004

Daily Activity Report

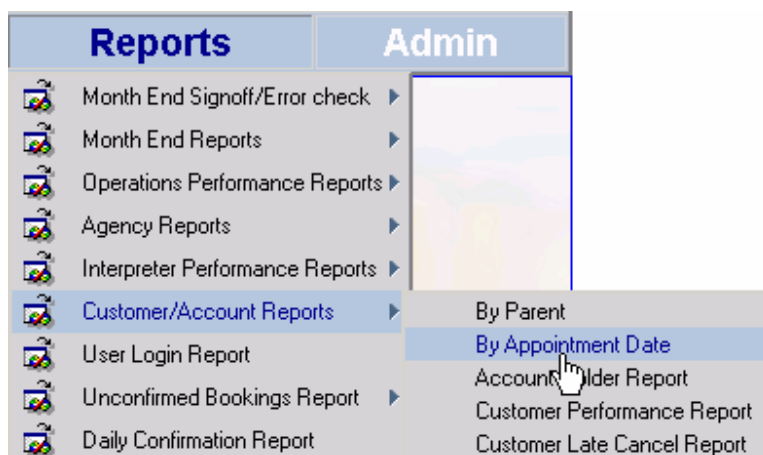
ST.MARY'S HOSPITAL NHS TRUST

Book Date	Booking ID	Appt. Date	Appt. Time	Pat. Ref.	Pat. Name	Language	Interpreter	
August 20, 2004								
Confirmed								
20-Aug-2004	607729	05-Oct-2004	10:30 am	3261566	FIDAA FLEIFEL	Arabic	SAYDA EL-SHARIEF	951
20-Aug-2004	607798	22-Sep-2004	12:20 pm	3331825	HANAN SALIM	Arabic	MOHAMMED BABIKER	898
20-Aug-2004	607803	18-Nov-2004	11:15 am	3156410	RAHAB ALHADI	Arabic	MOHAMMED BABIKER	898
20-Aug-2004	607794	09-Sep-2004	10:40 am	3320050	EMIL AZIZ	Arabic	MOHAMMED BABIKER	898
20-Aug-2004	607793	24-Aug-2004	4:00 pm	MJ1111195	CONFIDENTIAL CONFIDENTIAL	Spanish	GUILLERMO ARROYAVE	869
20-Aug-2004	607726	15-Nov-2004	11:15 am	M048000	MOHAMMED GARDALLA	Arabic	SAYDA EL-SHARIEF	951
20-Aug-2004	607795	13-Sep-2004	12:15 pm	3244416	ALI MOHAMMED	Kurdish	FADIL SAMAN	926
20-Aug-2004	607737	23-Aug-2004	10:30 am	3377260	ALIA KINKON	Arabic	AMIN BABIKIR	964
20-Aug-2004	607800	14-Oct-2004	1:45 pm	3306417	AMJAD AL-SAIQ	Arabic	MOHAMMED BABIKER	898
20-Aug-2004	607732	23-Aug-2004	3:00 pm	F111705	CONFIDENTIAL CONFIDENTIAL	Bengali	NADIRA ALI	963
20-Aug-2004	607802	11-Nov-2004	11:15 am	M204208	SHOUI CHENOG	Cantonese	TAMMY TOMS	9232
20-Aug-2004	607814	04-Aug-2004	4:30 pm	F110854	CONFIDENTIAL CONFIDENTIAL	Thai	RASME TOMEI NAKORN SUWAN	872
20-Aug-2004	607739	19-Aug-2004	9:20 am	F112257	CONFIDENTIAL CONFIDENTIAL	Russian	LUDMILA IGNATJEVA	969
20-Aug-2004	607790	02-Sep-2004	11:20 am	F110904	CONFIDENTIAL CONFIDENTIAL	Spanish	RHONA P. DESMOND	907
20-Aug-2004	607799	23-Sep-2004	4:00 pm	MJ109190	CONFIDENTIAL CONFIDENTIAL	Arabic	MOHAMMED BABIKER	898
Unconfirmed								
20-Aug-2004	607807	25-Aug-2004	9:45 am	3392440	ZEINAB AHMEN ALI	Arabic		
20-Aug-2004	607784	24-Aug-2004	10:00 am	3158158	ADNAN ABDULWAED	Arabic		
20-Aug-2004	607785	25-Aug-2004	3:20 pm	F111937	CONFIDENTIAL CONFIDENTIAL	Thai		

Example of report is shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.9.2 By Appointment Date



This report list all bookings by Status.

Account/Department	User	Booking	Reports	Admin
Parent Customer: ST.MARY'S HOSPITAL NHS TRUST		Notes: <div></div>		
Start Date: 20/08/2004	End Date: 20/08/2004			
<input type="button" value="Submit"/>		<input type="button" value="Home"/>		

Enter the Start and End Appointment dates for the report and select the Account Holder:

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Daily Activity Report

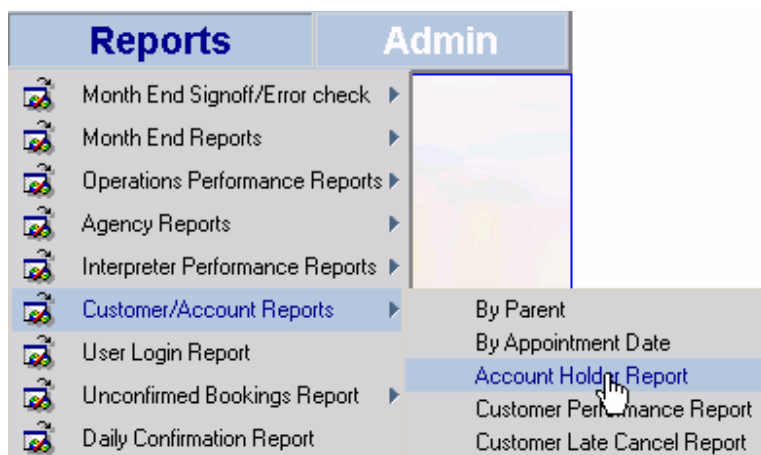
ST.MARY'S HOSPITAL NHS TRUST

Book Date	Booking ID	Appt. Date	Appt. Time	Pat. Ref.	Pat. Name	Language	Interpreter	
20/08/2004								
Cancelled								
31-Mar-2004	592533	20-Aug-2004	11:00 am	1152917	SOLTAN SALAH	Farsi	GHULAM RABANI ADEL	974
19-Jul-2004	604086	20-Aug-2004	9:15 am	3000236	ANTISAR AZIZ	Arabic	SAYDA EL-SHARIEF	951
29-Jul-2004	605545	20-Aug-2004	10:30 am	M241754	KHIRIA HUSSAIN	Arabic	MOHAMMED MERGHANI	879
2-Aug-2004	605903	20-Aug-2004	9:30 am	F111594	CONFIDENTIAL CONFIDENTIAL	Russian	LUDMILA IGNATJEVA	969
3-Aug-2004	606081	20-Aug-2004	2:30 pm	3368213	MONA HASANAIN	Arabic		
3-Aug-2004	606093	20-Aug-2004	2:30 pm	3368213	MONA HASANAIN	Arabic		
3-Aug-2004	606105	20-Aug-2004	2:30 pm	3368213	MONA HASANAIN	Arabic		
3-Aug-2004	606117	20-Aug-2004	2:30 pm	3368213	MONA HASANAIN	Arabic		
3-Aug-2004	606132	20-Aug-2004	2:30 pm	3368213	MONA HASANAIN	Arabic		
13-Aug-2004	607046	20-Aug-2004	10:30 am	M241754	KHIRIA HUSSAIN	Arabic		
Confirmed								
10-May-2004	597007	20-Aug-2004	2:10 pm	3341135	BERTHE ZIZA	Arabic	NAFISA EL-SHALLALY	905
9-Jun-2004	600238	20-Aug-2004	9:30 am	4174894	ANWAR BEGUM	Bengali	MEENA MALLIK	844
10-Jun-2004	600375	20-Aug-2004	10:20 am	3266120	AHMED KHALID FARAJ ALJAF	Arabic	MOHAMMED BABIKER	898
15-Jun-2004	600729	20-Aug-2004	11:00 am	M240115	RACHIDA BENKICEM	Arabic	MAGDALENE BURROWS	1009
25-Jun-2004	601888	20-Aug-2004	10:00 am	3172068	SAZID ALI	Bengali	SHAMSULALAM CHOUDHURY	842
2-Jul-2004	602674	20-Aug-2004	10:30 am	M241754	KHIRIA HUSSAIN	Arabic	SAYDA EL-SHARIEF	951
2-Jul-2004	602588	20-Aug-2004	3:30 pm	418 1317	FUNG LEUNG	Cantonese	WAI LING FUNG	846
8-Jul-2004	603219	20-Aug-2004	9:45 am	3129336	JOSE PEREIRA	Portuguese	MARIA C. R. DALRYMPLE	852
16-Jul-2004	603953	20-Aug-2004	9:45 am	3362128	NEMATUALLAH FARAJEE	Farsi	ALI HAJIGHASEM	887

Example of report is shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

3.6.9.3 Account Holder Report



This report lists all the departments for a particular Account Holder including the Address, Phone numbers and fax numbers.

Account/Department	User	Booking	Reports	Admin
Parent Customer: ST.MARY'S HOSPITAL NHS TRUST		Notes:		
<input type="button" value="Submit"/>		<input type="button" value="Home"/>		

Select the Account Holder and click on the 'Submit' button

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Account Holders



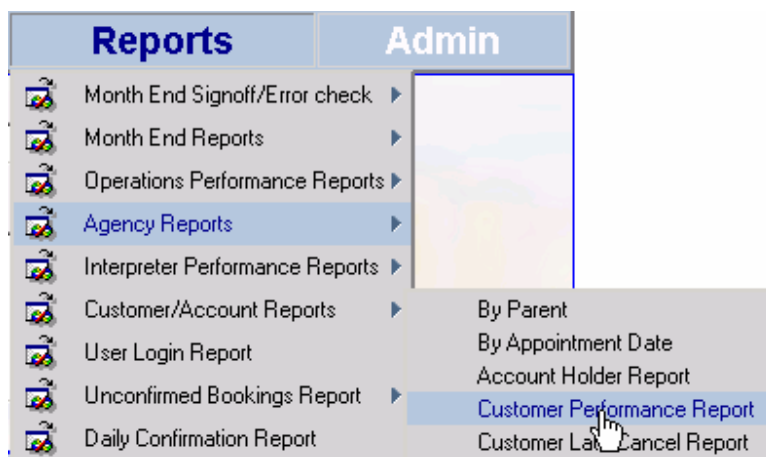
Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ

Name	Address	Phone/Fax
ST.MARY'S HOSPITAL NHS TRUST		
ACCIDENT & EMERGENCY	ST.MARY'S HOSPITAL	020 7886 6666
Account No: 651	PRAED STREET	020 7886 1211
	LONDON	
	W2 1NY	
ALBERT WARD	ST.MARY'S HOSPITAL	020 7886 6666
Account No: 653		
	LONDON	
	W2 1NY	
P.I.C.U	ST.MARY'S HOSPITAL	020 7886 2136
Account No: 1308		020 7886 1753
	LONDON	
	W2 1NY	
ALECK BOURNE WARD	ST.MARY'S HOSPITAL	020 7886 1146
Account No: 656		
	LONDON	
	W2 1NY	
ALEX CROSS WARD	WESTERN EYE HOSPITAL	020 78863227/8
Account No: 655	MARYLEBONE ROAD	
	LONDON	
	NW1	
ALMROTH WRIGHT WARD	ST.MARY'S HOSPITAL	020 7886 1175
Account No: 657	PRAED STREET	020 7886 6991
	LONDON	
	W2 1NY	

Sample report is shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
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3.6.9.4 Customer Performance Report



Account/Department	User	Booking	Reports	Admin
Parent Customer: ST.MARY'S HOSPITAL NHS TRUST		Notes: <div></div>		
Start Date: 01/05/2004				
<input type="button" value="Submit"/>		<input type="button" value="Home"/>		

Enter the Start date for the report and select the Account Holder

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Customer Performance Report



Westminster PCT NHS
 St Charles Hospital
 Courtfield House, Exmoor Street
 London W10 6DZ

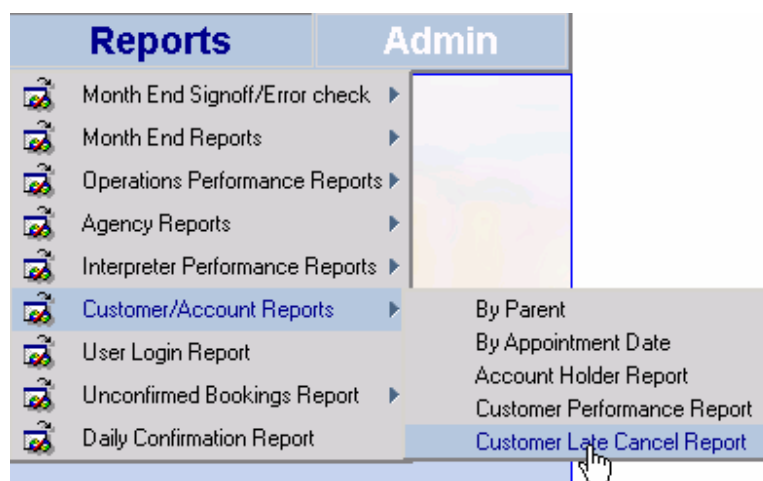
Standard/FUp %		Customer DNA %		Interpreter DNA %		GRIP Cancel Pay %		GRIP Cancel Not Pay %		Total Bokings %	
ST.MARY'S HOSPITAL NHS TRUST											
25/04/2004											
146	92.41	2	1.27	0	0.00	1	0.63	0	0.00	158	100.00
09/05/2004											
470	94.76	9	1.81	0	0.00	2	0.40	0	0.00	496	100.00
23/05/2004											
381	90.50	1	0.24	0	0.00	1	0.24	0	0.00	421	100.00
06/06/2004											
448	98.03	4	0.88	0	0.00	1	0.22	0	0.00	457	100.00

Sample report is shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
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3.6.9.5 Late Cancellation Report

This report provides details of Late cancellation by Account Holder

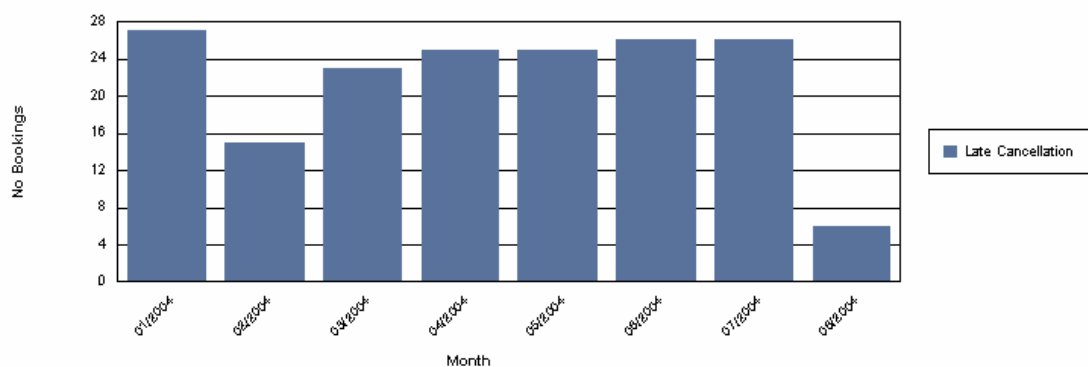


Account/Department	User	Booking	Reports	Admin
Parent Customer: <input type="text" value="ST.MARY'S HOSPITAL NHS TRUST"/>	Notes: <input type="text"/>			
Start Date: <input type="text" value="01/05/2004"/>				
<input type="button" value="Submit"/>		<input type="button" value="Home"/>		

Select the Account Holder and the Start date for the report

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Number of Cancellations



Daily Activity Report



Westminster PCT NHS
 St Charles Hospital
 Courtfield House, Exmoor Street
 London W10 6DZ

01/2004

ST.MARY'S HOSPITAL NHS TRUST

27

ANTENATAL CLINIC

4

AUDIOLOGY

1

CARDIOLOGY

1

CHEST & ALLERGY CLINIC

2

DERMATOLOGY

1

JEFFERISS WING

2

Sample Report shown above

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3.6.10 User Login Report



This Report shows the date and time that users logged onto the system. This includes OMIS users, Customers and Interpreters.

Account/Department	User	Booking	Reports	Admin
Start Date: <input type="text" value="20/08/2004"/>		Notes: <div style="border: 1px solid black; height: 40px;"></div>		
<input type="button" value="Submit"/>		<input type="button" value="Home"/>		

Enter the Start date for the Report

Online Management of Interpretive Services (OMIS)	Version: 4.1
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GRIP ORGANISATION

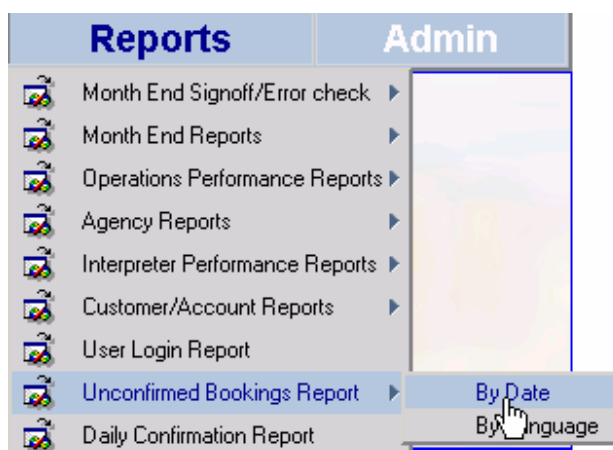
	Date of Login
AKECH, LYNDA	20/08/2004 09:31:20 20/08/2004 09:48:56
ANGOL, SHARON	20/08/2004 16:02:34 20/08/2004 17:35:20 20/08/2004 17:37:02
BAJULAIYE, WINNIE	23/08/2004 10:56:42
COLEMAN, GEORGE	20/08/2004 09:08:42 22/08/2004 08:15:47 22/08/2004 18:38:32 22/08/2004 18:48:07 22/08/2004 19:07:09 23/08/2004 09:14:26
COOPER, SUE	20/08/2004 14:56:53 20/08/2004 14:57:53 23/08/2004 09:22:50
EVANS, URSULA	20/08/2004 09:05:25 20/08/2004 09:05:32 20/08/2004 09:05:38 20/08/2004 09:30:58 20/08/2004 11:40:48 23/08/2004 09:01:58 23/08/2004 09:02:07 23/08/2004 09:02:20
GRAY, VALERIE	20/08/2004 11:26:56 20/08/2004 15:44:49 23/08/2004 09:36:18

Sample Report is shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
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3.6.11 Unconfirmed Bookings Report

3.6.11.1 By Date




Account/Department	User	Booking	Reports	Admin
Start Date: 23/08/2004	End Date: 23/08/2004	Notes: <div></div>		
Submit		Home		

Enter the start and end dates for the report

Unconfirmed Bookings Report

Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ



23-Aug-2004

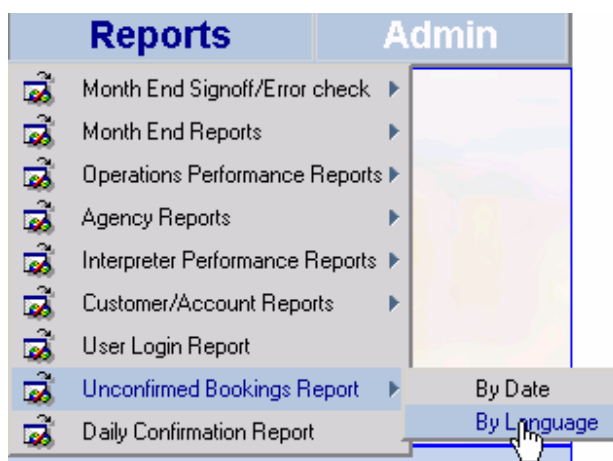
New No	Time	Gender	Dur.	Customer	Patient Name	Pat. ID	Caller Name	Venue Address
Polish				1				
607834	12:30:00	Unknown	1 0	ALBOK BOURNEWARD	MARIA JZIELINZKA	9025919	PALS FAX	ST MARY'S HOSPITAL FRAED STREET CLARENDON EWMOND 1ST FLOOR LONDON
Total Bookings				1				

UNZ 18V

Sample Report shown above

Online Management of Interpretive Services (OMIS)	Version: 4.1
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3.6.11.2 By Language



This report show unconfirmed bookings by language. This can be useful for Interpreters

Account/Department	User	Booking	Reports	Admin
Language: <input type="text" value="French"/>		Notes: <div style="border: 1px solid black; height: 40px;"></div>		
<input type="button" value="Submit"/>		<input type="button" value="Home"/>		

Select the Language and click on 'Submit' to create the report

Online Management of Interpretive Services (OMIS)	Version: 4.1
OMIS Administrator Manual	Date: 15-Nov-2004

Unconfirmed Bookings Report By Language

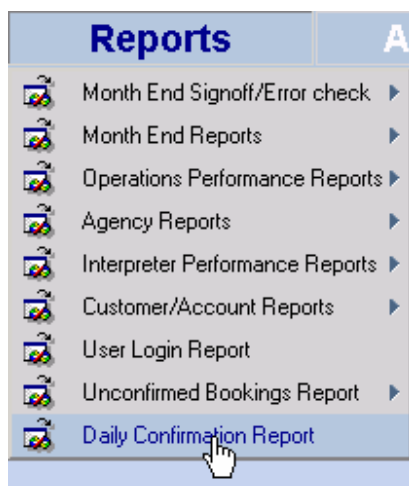
Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ



French

New No	Time	Gender	Dur.	Customer	Patient Name	Pat. ID	Caller Name	Venue Address
31-Aug-2004 606540 14:30:00	Female	2	0	1 ARTERKATOLIMC	MARZOUKA MUKRANE	3404896		THE MEDICAL CENTRE 7 E, WOODFIELD ROAD LONDON W10 6DZ
9-Sep-2004 607671 10:15:00	Female	1	0	1 CHILDREN AND FAMILIES	NINA AMPITI		STEFANIA FOGEL	CHELSEA & WESTMINSTER HOSPITAL 365 FULHAM ROAD OFFICE, 1ST FLOOR, LIFT B JOYKAE LONDON SW10 5NH
20-Sep-2004 606627 09:00:00	Female	1	0	1 CHILDREN AND FAMILIES	GERMAINE TOKEUTOU- LOOWELADJI	01510728		CHELSEA & WESTMINSTER HOSPITAL 365 FULHAM ROAD OFFICE, 1ST FLOOR, LIFT B LONDON SW10 5NH
27-Sep-2004 606711 11:00:00	Female	4	0	1 ANALOG & ANAESTHETICS (DAY SURGERY)	MAYANI OSINGELA	1513351		CHELSEA & WESTMINSTER HOSPITAL 365 FULHAM ROAD DAY SURGERY, GROUND FLOOR LONDON SW10 5NH
28-Sep-2004 607381 14:00:00	Female	1	0	1 CHILDREN AND FAMILIES	GEORGETTE NGORAN		STEFANIA FOGEL	CHELSEA & WESTMINSTER HOSPITAL 365 FULHAM ROAD OFFICE, 1ST FLOOR, LIFT B JOYKAE LONDON SW10 5NH

3.6.12 Daily Confirmation Report



This report shows the number of confirmation completed by users

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Account/Department	User	Booking	Reports	Admin
<div> <div>Start Date:</div> <div>23/08/2004</div> <div>End Date:</div> <div>23/08/2004</div> <div>Notes:</div> <div></div> </div>				
<div> <div>Submit</div> <div>Home</div> </div>				

Enter the Start and End dates and 'Submit' to start the report

Daily Confirmation Report



Westminster PCT NHS
 St Charles Hospital
 Courtfield House, Exmoor Street
 London W10 6DZ

23-August-2004

Standard

GEORGE COLEMAN	16	33.33%
JOSEPHINE OKAFOR	32	66.67%
	48	100%

Notes:


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3.7 Administration

3.7.1 Languages

This section shows how to view and amend the Language Costs for various Languages and Agency





Account/Department	User	Booking	Reports	Admin
Language Costs				

	Language_Type_Desc	Language_Cost	Out_Of_Hours_Cost	Language_Cost_Subseq	Out_Of_Hours_Cost_Subseq	GradeA	GradeB	GradeC
+	Core	43.1200	53.6400	4.2000	4.2000	15.7000	13.6100	11.510
+	Non_Core	47.3300	57.8500	4.2000	4.2000	25.1200	23.0300	20.930
+	Rare	61.0000	71.5200	4.2000	4.2000	34.5400	32.4500	30.350
	Core	44.8800	55.8300	4.3800	4.3800	17.5500	15.2200	12.870
	Non_Core	49.2600	60.2100	4.3800	4.3800	28.0900	25.7500	23.400
	Rare	63.4900	74.4400	4.3800	4.3800	38.6200	36.2900	33.940
	Prestige	44.8800	44.8800	10.0000	10.0000	0	0	0
	Language Difference	44.8800	44.8800	10.0000	10.0000	0	0	0

Add...
Language_Type
Language:

Enter Password to Update:

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Use the (+) symbol to navigate and view the Languages that are defined in the various classes (Core, Non Core and Rare).

If any of the costs are amended, then you must provide a password to update the details

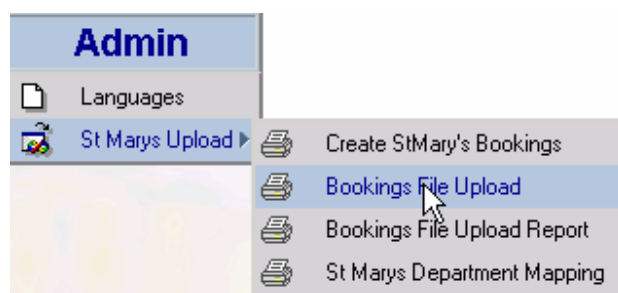
3.7.2 St Mary's Upload

This section describes the upload procedure for loading St Mary's Bookings. The upload should be run from the Customer site. The upload procedure is as follows:

- (1) The (Telemagic) export file needs to be uploaded onto the Server
- (2) The bookings can be loaded and create in the OMIS System
- (3) Report printed to check and make any manual amendments

Any Mapping changes between St Mary's and OMIS need to be made by the Mapping screen.

3.7.2.1 Bookings File Upload

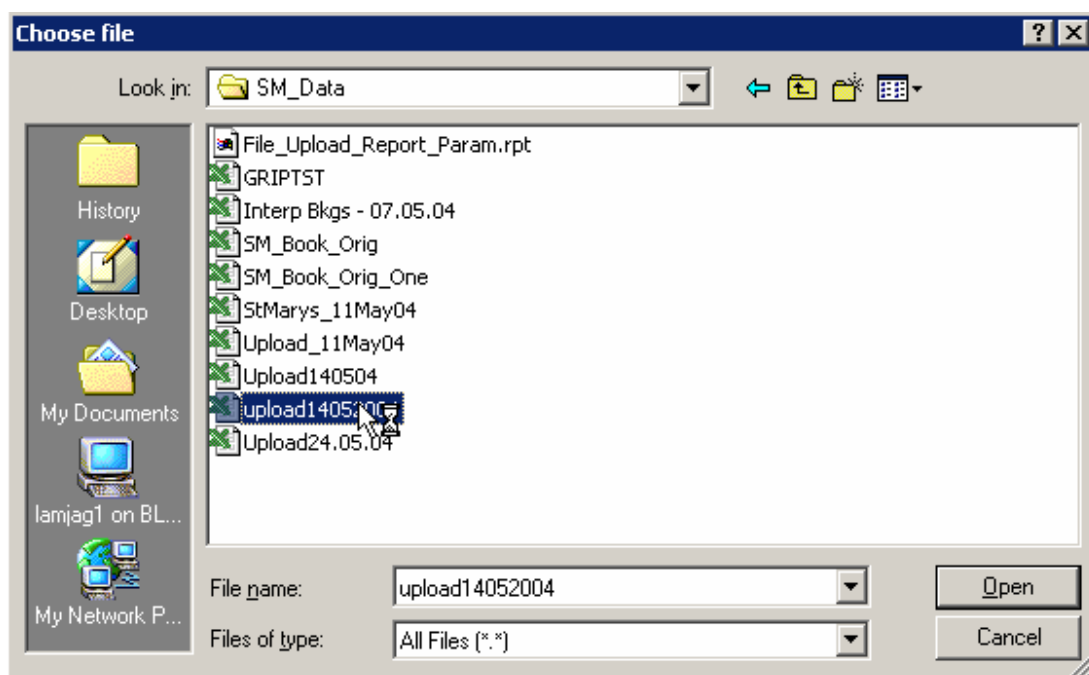


Select File to Upload:

Save as filename (no path):

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Click on the 'Browse' button to select the file to be uploaded onto the Server



Select the file to be uploaded

Select File to Upload:

Save as filename (no path):



Enter the Save as filename to be create don the Server

Click on the 'Upload' button

Online Management of Interpretive Services (OMIS)	Version: 4.1
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Select File to Upload:

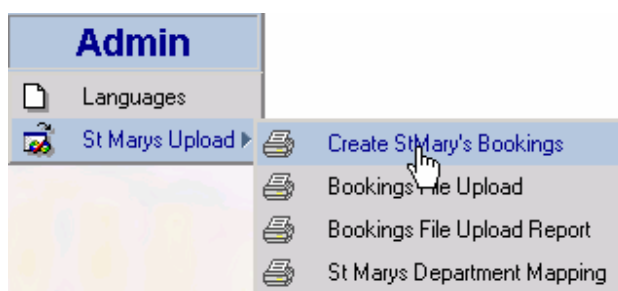
Save as filename (no path):

File uploaded successfully on the web server



If the upload is successful then the message 'File Uploaded successfully on the web server' will be displayed.

3.7.2.2 Create St Mary's Bookings



Once the file has been uploaded onto the server, you can then create the bookings from this file

St Mary's Bookings Upload						
Upload ID	File Name	Uploaded By	Upload Date	Upload Time	Run_By	
117	C:\inetpub\wwwroot\GRIPOnline\SM_Data\Upload_020804	CHURCHHOUSE, KAREN	Aug 02, 2004	14:24:57	0	
131	C:\inetpub\wwwroot\GRIPOnline\SM_Data\SMH Upload	ANGOL, SHARON	Aug 13, 2004	14:45:03	0	

Click on the button which identifies the file you have just uploaded. This will start the upload procedure and you should get a message confirming that the upload was successful.

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3.7.2.3 Bookings File Upload Report



The upload report should identify any errors that occurred during the upload process.

Account/Department	User	Booking	Reports	Admin
Start Date: 20/08/2004	End Date: 20/08/2004	Notes: <div></div>		
Submit		Home		

Enter the start and end dates for the report and click on the 'Submit' button

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Bookings File Upload Report

Westminster PCT NHS
St Charles Hospital
Courtfield House, Exmoor Street
London W10 6DZ



20-Aug-2004

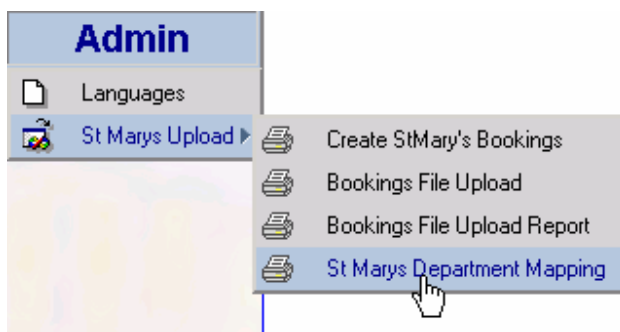
C:\inetpub\wwwroot\GRIPOnline\SM_Data\Upload20082004

Error Message	Patient Name		Pat. ID	Booking Ref	App. Date	Appt.
	Confidential	Confidential	MJ111195	607783	24-Aug-2004	4:00 pm
No Department Found for this Booking	Adnan	Abdulwaed	3158158	607784	24-Aug-2004	10:00 am
	Confidential	Confidential	F111937	606933	25-Aug-2004	3:20 pm
	Lefferi	Hyseni	3280195	607786	25-Aug-2004	11:00 am
	Khaled	Khlifi	3376953	607787	25-Aug-2004	10:45 am
	Masoumeh	Etemadi	3313603	607788	26-Aug-2004	2:45 pm
	Malgorzata	Marta-Zalewska	3404855	607789	31-Aug-2004	2:30 pm
		Confidential	F110904	607790	02-Sep-2004	11:20 am
		Confidential	M110899	607791	09-Sep-2004	3:00 pm
	Abdul Matlib	Khan	M217951	607792	09-Sep-2004	10:15 am
	Parkash	Kapoor	3350103	607793	09-Sep-2004	10:30 am
	Emil	Aziz	3320050	607794	09-Sep-2004	10:40 am
	Ali	Mohammed	3244416	607795	13-Sep-2004	12:15 pm
	Kok	To	4198851	607796	14-Sep-2004	2:15 pm
	Tejflk	Pantina	3084374	607797	20-Sep-2004	12:15 pm
	Hanan	Salim	3331825	607798	22-Sep-2004	12:20 pm

Sample of report is shown above

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3.7.2.4 St Mary's Department Mappings



This allows you to create and maintain a mapping between the ST Mary's file departments and those held on the OMIS system

The screenshot shows a web browser window titled 'SM_Upload_Mapping_Edit - Microsoft Internet Explorer'. The main heading is 'St Marys Data Mapping'. On the left, there is a table with columns 'Location_ID' and 'Organisation_ID'. The table lists various locations, with '305' highlighted. On the right, there is a form with fields for 'Location ID', 'Org_ID', 'St Mary's Location', 'Department Name', 'Address', 'Postcode', 'Telephone', and 'Fax'. The 'Update' button is at the bottom right of the form.

Location_ID	Organisation_ID
224	41735
225	41773
300	36254
301	36254
302	36254
303	36254
304	36254
305	36254
306	36257
307	36257
308	36257
309	36257
310	36259
311	36263
312	36263
313	36263
314	36264
315	36264

Form fields:

- Location ID: 305
- Org_ID: 36254
- St Mary's Location: Waller Cardiac Clinic, St. Marys, W2, O.P.D
- Department Name: CARDIOLOGY
- Address: ST MARY'S HOSPITAL NHS TRUST, PRAED STREET, LONDON
- Postcode: W2 1NY
- Telephone: 020 7886 6666
- Fax: 020 7886 6239

Buttons: Submit, Home, Update

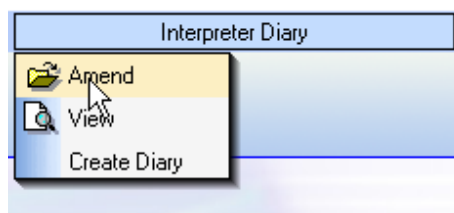
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Click on the left edge beside the department that needs to be amended and the Pop-up screen be displayed showing the details for this department. Amend the screen as necessary and press the 'Update' button

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3.8 Amend Interpreter Diary

The Interpreter's diary can be accessed via the main menu option as follows:



Click on the 'Amend' option to enter the Interpreter's Diary

Amend Interpreter's Diary

Interpreter: View By:

November 2004

Mon	Tue	Wed	Thu	Fri	Sat	Sun
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	01	02	03	04	05
06	07	08	09	10	11	12

- ☒ Unconfirmed
- ☒ Confirmed
- ☒ Cancelled
- ☒ Signed Off
- ☒ Invoiced

	14/11/2004	15/11/2004	16/11/2004	17/11/2004	18/11/2004	19/11/2004	20/11/2004
8:00 AM							
8:30 AM							
9:00 AM							
9:30 AM							
10:00 AM							
10:30 AM							
11:00 AM							
11:30 AM							
12:00 PM							
12:30 PM							
1:00 PM							
1:30 PM							

The above screen shows the default display for the Interpreter's diary.

Online Management of Interpretive Services (OMIS)	Version: 4.1
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3.8.1 Selecting the Interpreter

Select the name of the Interpreter whose diary needs to be amended. On selecting the interpreter, the screen will default to the Interpreter's diary for today.

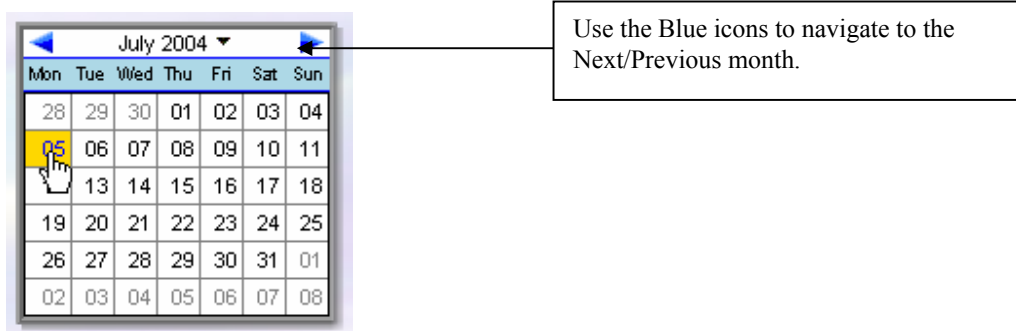
Interpreter:

ABBAS, ALMUTAZ	▼
ASHITANI-ESLAMIAN, IRAN	▲
ASKARY, SOHAIL A.	
BABIKER, MOHAMMED	
BABIKIR, AMIN	
BAGAR, JAAFER	
BAHJA, WASIM	
BAJULAIYE, WINIFRED	
BALAKRISHNAN, SOORIPPILLAI	
BALAL, MAHA	
BALDUCCI, SILVIA	
BALDUCCI, SILVIA	
BANGURA-CONTEH, AUDREY	
BARNES, JACOB	
BECK, ORIT SUIRSKY	
BEGUM, RUKIA	
BEHJAT, GHOLAM	
BENJELLOUN, WAFAA	
BEN-MABROUK, NOUR-EDDINE	
BENOMAR, SOUAD	
BIBI, MARY	
BICHRI, IWONA	
BIJWADIA, SUBODH	
BOUSSETTA, AHMED	
BOUZID, NOURR-EDDINE	
BROOMFIELD, VANESSA	
BROWN, HIROKO UKIYAMA	
BURROWS, MAGDALENE	
CALDWELL, SANDRINE THI MAI	
CARANZA, ANGELA	
CATINO, ANI	▼

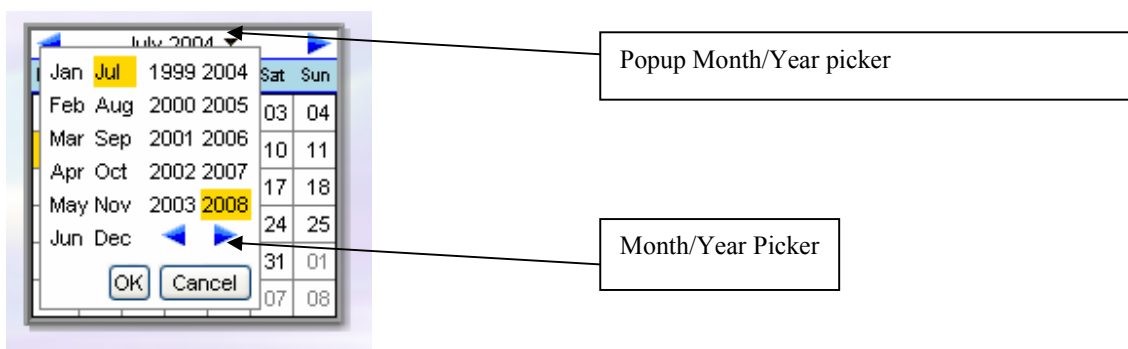
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3.8.2 Selecting the Date

Use the Calendar to select the date that you need for viewing the Interpreter's diary:



Use the Next/Previous Month picker to view dates for different months of the year. Click on the Day that you want to start viewing the Calendar. In the example above the diary will start on the 5th July 2004.



Use the Popup Month/Year selector to navigate to the required Year and Month. After selecting the Month/Year click on the 'OK' or 'Cancel' button.

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3.8.3 Selecting Day/Week/Month Views

3.8.3.1 Day View

By default the first view that is displayed is the Day view. This shows 7 days starting from today's date. If another date is selected from the Calendar, then the view will show the next seven days starting from the selected date.

Amend Interpreter's Diary

Interpreter:

BENJELLOUN, WAFAA

View By:

Day

July 2004

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	01
02	03	04	05	06	07	08

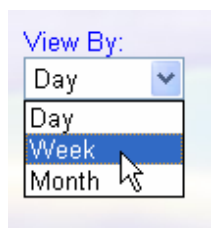
☒ Unconfirmed
☒ Confirmed
☒ Cancelled
☒ Signed Off
☒ Invoiced

	05/07/2004	06/07/2004	07/07/2004	08/07/2004	09/07/2004	10/07/2004	11/07/2004
8:00 AM							
8:30 AM							
9:00 AM	593618	593634	593649		604956		
9:30 AM							
10:00 AM							
10:30 AM							
11:00 AM				602559 requested by Gwyneth			
11:30 AM							
12:00 PM							
12:30 PM							
1:00 PM							
1:30 PM		601829					
2:00 PM							
2:30 PM							
3:00 PM		593681		602573 1133x 885x			
3:30 PM							

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3.8.3.2 Week View

The Week view allows you to view the Diary for the next two weeks.



Select the 'Week' option as shown above to amend the diary to 'Week' View

Amend Interpreter's Diary

Interpreter:

BENJELLOUN, WAFAA

View By:

Week

July 2004

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	01
02	03	04	05	06	07	08

- ☒ Unconfirmed
- ☒ Confirmed
- ☒ Cancelled
- ☒ Signed Off
- ☒ Invoiced

	8:00 AM	8:30 AM	9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM	3:00 PM	3:30 PM	4:00 PM	4:30 PM	5:00 PM	5:30 PM	6:00 PM	6:30 PM	7:00 PM	7:30 PM
05/07/2004	593618																							
06/07/2004	593634																							
07/07/2004	593649																							
08/07/2004	604956																							
09/07/2004	604920																							
10/07/2004	605084																							
11/07/2004																								
12/07/2004	604904																							
13/07/2004	604938																							
14/07/2004																								

In the 'Week' view the dates are shown on the side and the time on the Top of the view.

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3.8.3.3 Month View

The Month view allows you to view the Diary for the next month starting from the selected date.



Select the 'Month' option as shown above to amend the diary to 'Month' View

Amend Interpreter's Diary

Interpreter: View By:

☒ Unconfirmed
☒ Confirmed
☒ Cancelled
☒ Signed Off
☒ Invoiced

	8:00 AM	8:30 AM	9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM	3:00 PM	3:30 PM	4:00 PM	4:30 PM	5:00 PM	5:30 PM	6:00 PM	6:30 PM	7:00 PM	7:30 PM
05/07/2004																								
06/07/2004																								
07/07/2004																								
08/07/2004																								
09/07/2004																								
10/07/2004																								
11/07/2004																								
12/07/2004																								
13/07/2004																								
14/07/2004																								
15/07/2004																								
16/07/2004																								
17/07/2004																								
18/07/2004																								
19/07/2004																								

The month view, similar to the Week view shows the dates at the side of the display and the time at the top of the display.

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3.8.4 Viewing Bookings by Status

You can view bookings for the Interpreter by selecting/unselecting the status of the bookings that you need to view:



By default all the Bookings status' are selected. Unselect any booking status that you do not wish to view. This will trigger a refresh and the bookings for the status that was unselected will not be displayed. In the above example all 'Confirmed' bookings have been unselected and are not displayed on the diary after the refresh.

Interpreter: View By:

July 2004

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	01
02	03	04	05	06	07	08

☐ Confirmed
☒ Cancelled
☒ Signed Off
☒ Invoiced

	8:00 AM	8:30 AM	9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM	12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM	3:00 PM	3:30 PM	4:00 PM	4:30 PM	5:00 PM	5:30 PM	6:00 PM	6:30 PM	7:00 PM	7:30 PM
05/07/2004																								
06/07/2004																								
07/07/2004																								
08/07/2004																								
09/07/2004																								
10/07/2004																								
11/07/2004																								
12/07/2004																								
13/07/2004																								
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15/07/2004																								
16/07/2004																								
17/07/2004																								
18/07/2004																								
19/07/2004																								
20/07/2004																								
21/07/2004																								
22/07/2004																								
23/07/2004																								

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3.8.5 Booking Status Colours

The colour scheme that is used for the status of the bookings is as follows:

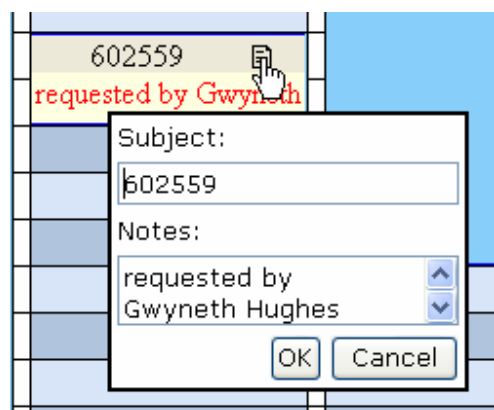
Booking Status	Colour
Confirmed	Yellow
Cancelled	Red
Signed-off	Green
Invoiced	Blue

3.8.6 View Booking Notes

You can view the booking notes by using two methods:

- (3) Click on the notes icon shown within the booking
- (4) Click twice on the booking notes (which may not all be visible). Once to select the booking and the second time to view the notes

Use the OK or Cancel button to close the notes. Bookings cannot be created or edited via the Interpreter's Diary. You can view the details only.



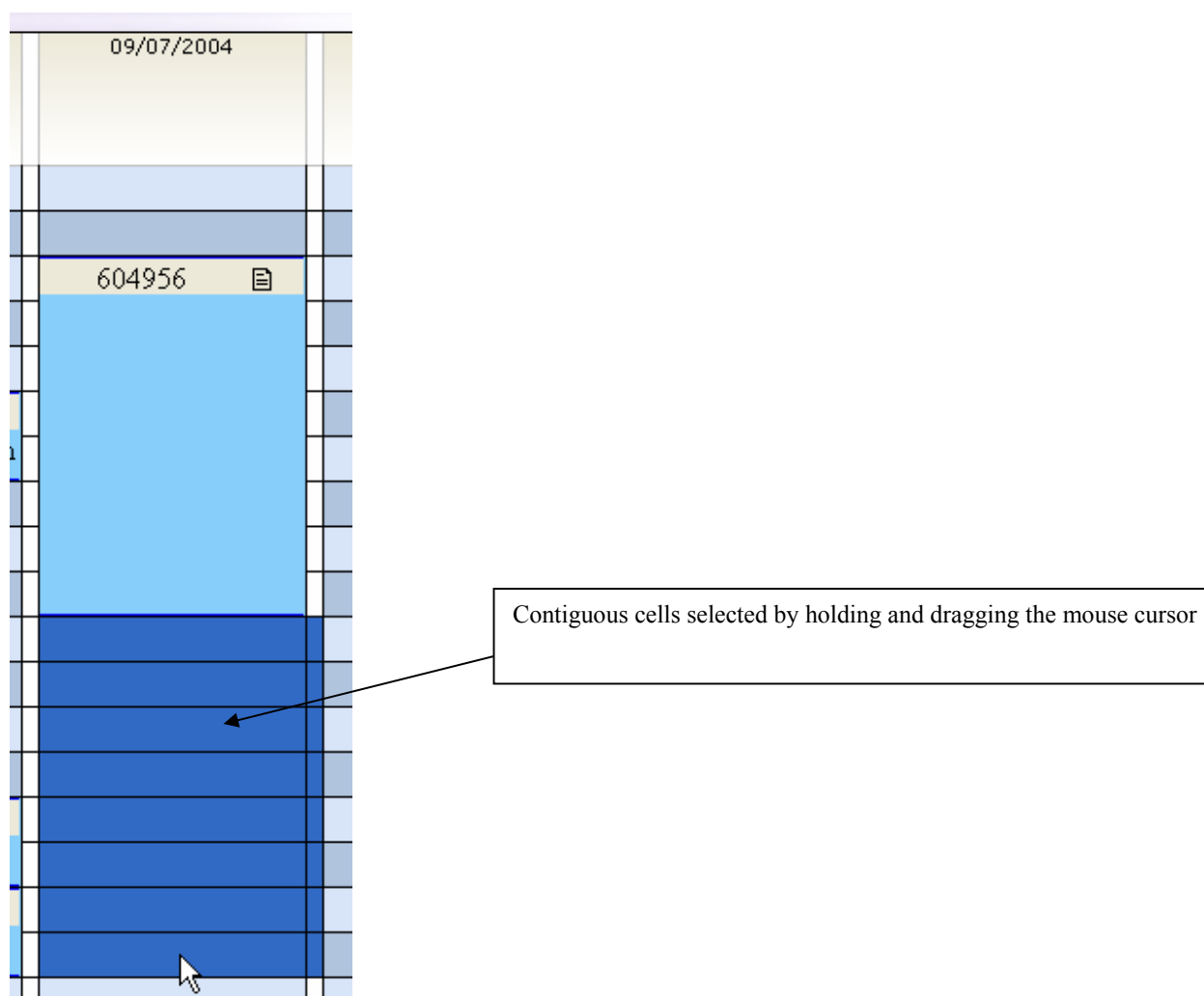
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3.8.7 Enter Interpreter 'Unavailability'

This function allows you to enter the times when the interpreter is not available on a particular day.

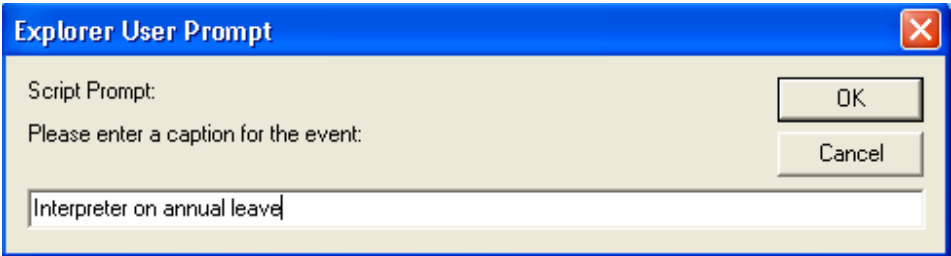
You can create the unavailability block in two ways:

- (3) Click on a day cell
- (4) Select a contiguous range of day cells

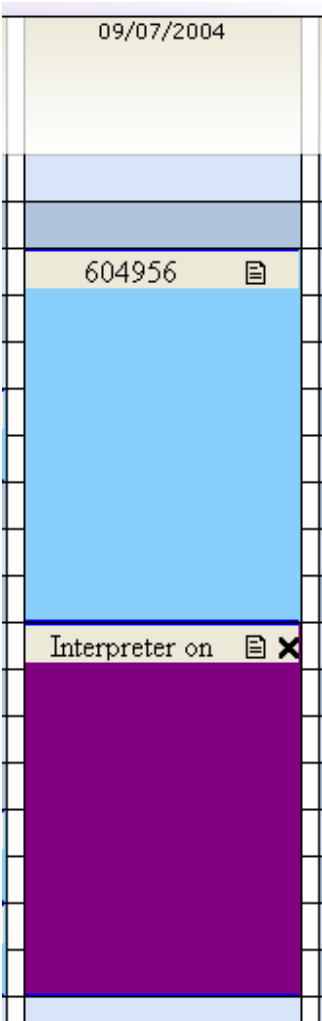


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This will display the following prompt so that you can enter the notes relating to the unavailability



Enter the text and click on the 'OK' button



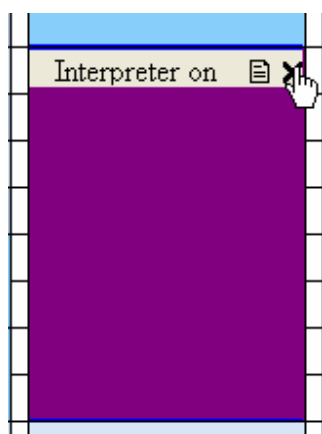
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The availability of the interpreter is entered and is shown in purple colour. You can edit the text for this by:

- (5) Clicking on the notes icon shown within the booking
- (6) Clicking twice on the notes (which may not all be visible). Once to select the event and the second time to view the notes

3.8.8 Deleting Interpreter Unavailability

To delete the event showing the Interpreter's unavailability click on the X on the top right of the event:



Then click on the 'OK' button and the event will be deleted.

